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FOREWORD

The December Market Commentary provides the 1984 forecasts for all major commodities and a review of 1983. In 1984, agricultural output is expected to grow slowly with commodity prices increasing moderately. Grain prices may decline late in the year if large world crops occur. This may in turn lower prices of poultry, eggs and dairy products. Red meats prices, however, are expected to increase in late 1984 if production declines below 1983, as expected.

The papers published in this issue of Market Commentary were released at the Canadian Agricultural Outlook Conference in Ottawa, on December 12 and 13, 1983. They constituted the base for the Outlook presentations made during the Conference commodity sessions, and during plenary sessions.

Forecasts in this issue of Market Commentary are based on information available to the authors up to mid-November. The Editorial Board approved the forecasts in this issue on November 14-15, 1983. An update of the forecasts will be prepared in March 1984.

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GRAINS AND OILSEEDS

WHEAT

C.V. Fulton

HIGHLIGHTS

With world production of wheat similar to last year's and increased carryin stocks, a record supply dominates the wheat outlook for 1983-84. Although an increase in world utilization is forecast, utilization will remain lower than world production. Ending world stocks of wheat are predicted to increase again in 1983-84, but the 5% increase will be less than the 13% in 1982-83. With a stable world demand for wheat and a small increase expected in world trade, prices are likely to average only 0-5% higher in 1983-84 as compared to 1982-83.

The major factors affecting wheat prices in 1984-85 will be the size of the U.S. wheat crop and wheat production in the other major exporting countries. Grain production in the USSR and China is another important factor, as these two countries are the two largest importers of wheat. Unless the world supply of wheat tightens, wheat prices are not expected to increase in 1984-85, and in fact, could decline. The U.S. Department of Agriculture has announced that the support price for wheat for 1984-85 will be reduced to U.S. $121.25/t from $134.11/t in 1983-84.

The supply of wheat in Canada in 1983-84 is expected to be slightly above the previous year. Canadian wheat exports are predicted to decline 4%, partly because of reduced total wheat imports by the USSR and China. With domestic use the same as a year earlier and exports lower, ending stocks are forecast to increase 1.2 Mt in 1983-84. Canadian bread wheat prices are expected to remain near the levels of mid-November until the spring of 1984. For 1983-84, prices for No. 1 CWRS 13.5% protein wheat in store at Thunder Bay are expected to average in the $205-$215/t range, compared with the 1982-83 average price of $204.60/t.

For 1984-85 the area seeded to wheat in Canada is predicted to decline, with the extra area being seeded to barley and rapeseed.

WORLD WHEAT REVIEW - 1982-83

In 1982-83 world wheat production exceeded than utilization. This contributed to a 11 Mt increase in world wheat stocks and a softening in world prices. In the second half of 1982-83 wheat prices strengthened somewhat in response to the U.S. PIK program, which reduced the area seeded to wheat in the United States in 1983-84. The U.S. farm price for wheat averaged U.S. $129.70/t compared with $134.11/t in 1981-82 and $143.67 in 1980-81.

WORLD OUTLOOK - 1983-84

World carryin stocks of wheat for 1983-84 are estimated at 97 Mt, 13% above a year earlier and the largest carryin since 1979-80. World wheat production is presently forecast to be 483 Mt, 4 Mt more than last year's record crop of 479 Mt. With a carryin of 97 Mt, total supply is expected to increase 3% to 580 Mt.

Record wheat crops are expected in China and India. The Chinese wheat crop is expected to be 78 Mt, compared to 68.4 Mt a year earlier. The Indian crop is estimated to be a record 42.5 Mt, compared to 37.8 Mt in 1982-83. The Soviet wheat crop is expected to drop to 80 Mt from last year's 85 Mt. Overall, the production of the major importers is forecast to increase 2% in 1983-84 (Table 1).

Wheat production by the 5 major exporters is forecast to decline about 1% relative to 1982-83. However, exporter carryover stocks have increased 27%, and therefore exportable supplies will be larger than in 1982-83. Australian production is forecast at 20 Mt, more than double last year's drought-reduced crop. The Argentine wheat crop is predicted to be 13 Mt, 14% lower than last year's record 15.1 Mt because of lower yields and a smaller area seeded to wheat. Wheat production in the European Economic Community (EEC) is estimated at 58.9 Mt, 1% less than last year's record crop, mainly as a result of decreased yields in France and Italy.

In the United States, the harvested wheat area was 23% below the year-earlier level due to the acreage reduction and PIK programs. Wheat production in the United States is estimated at 65.5 Mt, representing the third largest wheat crop ever. Production is only 14% below last year's level, despite the 23% reduction in harvested area, because of the record yield. Although the U.S. drought reduced spring wheat yields, it did not have much of an effect on the U.S. winter wheat crop, as yields were 16% above the previous year. In general, spring wheat accounts for only about 25% of total U.S. wheat production. Moreover, the U.S. wheat supply in 1983-84 will decline by less than 1% because of a 32% increase in beginning stocks.

World utilization of wheat in 1983-84 is forecast to be 478 Mt. Increased consumption of wheat is predicted in the United States, the EEC and China. In the United States and the EEC substantially larger quantities of wheat are expected to be fed to livestock. In China increased consumption will result from increased wheat production and a decrease in domestic rice production. However, wheat consumption is expected to decline in the USSR, since less wheat will be fed to livestock as a result of larger domestic coarse grain production. Because world utilization of wheat is expected to be less than world production, world wheat stocks will increase in 1983-84 by 5 Mt to 102 Mt. This figure represents 21% of predicted utilization in 1983-84, the same as in 1982-83, but higher than the 19% level of 1981-82.

World trade in wheat is forecast at 101 Mt, compared to an estimated 98 Mt in 1982-83. Increased wheat imports are predicted for the EEC and for developing countries. However, the largest wheat importer, the USSR, is expected to import less wheat this year because of the improved quality of its wheat crop. China will likely import less wheat in 1983-84 than the year before because of increased domestic wheat production.

Because wheat supplies in each of the five major wheat exporters are as large as or larger than last year's, with the exception of Argentina, wheat prices are predicted to average only 0-5% higher in 1983-84 than a year earlier. In the United States, the farm price for wheat is expected to average in the U.S. $130-$136/t range.

For the remainder of the crop year, there are a number of factors which will affect wheat prices in the United States: the level of U.S. wheat exports, which are partially dependent on the value of the U.S. dollar in relation to other major currencies; the amount of wheat fed to livestock in the United States; the level of participation of U.S. wheat producers in the 1984-85 acreage reduction and PIK programs; and the quantity of wheat placed in the Commodity Credit Corporation (CCC) commodity loan program and in the farmer-owned reserve when it is opened in March. For 1983-84 the national average loan rate is U.S. $134.11/t. This loan rate has remained above the U.S. average farm price for wheat for the first 6 months of the 1983-84 crop year which began June 1, 1983. The U.S. farm price has averaged U.S. $130/t during this period.

World production of durum wheat in 1982-83 is estimated to have fallen to 22.5 Mt from 25.2 Mt. Most of this production decline occurred in Canada and the United States, the two largest exporters of durum wheat. Durum production also declined in the EEC and in the North African countries of Morocco and Tunisia. Because of the reduced production in the last two countries, world import demand for durum wheat is expected to increase to 5 Mt from the 4.6 Mt recorded in 1982-83. Because of reduced supplies of durum wheat in the major exporting countries and the expected increase in import demand, durum wheat prices in 1983-84 have strengthened much more than have bread wheat prices.

WORLD OUTLOOK - 1984-85

The USDA announced the details of its 1984-85 wheat program on August 8, 1983 (See Appendix A). The 1984-85 wheat program is not as financially attractive to wheat producers as was the 1983-84 program. Thus the percentage of wheat producers participating will likely drop and more U.S. land will be used to grow wheat next year. However, price expectations for 1984-85 as of mid-December are lower than they were in late summer and early fall when U.S. wheat farmers were making their planting decisions. Thus as prices weaken, farmer

participation in the wheat program can be expected to increase. In addition, the U.S. Congress can still make changes in the provisions of the program. The signup period for the 1984-85 program is January 16 to February 24, 1984 for both spring and winter wheat producers.

Ending stocks of wheat in the United States in 1983-84 are expected to be about 2 Mt less than they were in 1982-83. However, current indications are that U.S. wheat production next year is likely to be similar to the 1982-83 record level. In Argentina ending stocks are predicted to decline as a result of lower production in 1983-84. In the EEC ending stocks are also expected to decline because of lower production and the increased use of domestic wheat as feed. However, in Australia ending stocks are expected to rise sharply because of record production in 1983-84. For the 5 major exporters including Canada, ending stocks of wheat in 1983-84 are predicted to be larger than year- earlier levels. Hence there will again be a large carryin of exporters' stocks again in 1984-85.

CANADIAN WHEAT REVIEW - 1982-83

Canadian 1982-83 exports of wheat and wheat flour totaled 21.4 Mt, setting a record for the third year in a row. These exports consisted of 18.3 Mt of wheat, 2.7 Mt of durum wheat, and 0.4 Mt of flour (in wheat equivalent). The USSR and China remained Canada's two most important customers for its wheat exports. Export is the most important outlet for Canadian wheat; over 75% of Canadian production. In 1982-83 Canada accounted for approximately 22% of the world trade in wheat, compared to 18% a year earlier.

Carryover stocks as of July 31, 1983 were 10 Mt, 0.2 Mt above the previous year. Domestic use was unchanged from the year-earlier level at 5.2 Mt. In 1982-83 the Canadian Wheat Board (CWB) price for No. 1 CWRS 13.5% protein wheat in store at Thunder Bay averaged $204.60/t, compared to $214.20/t in 1981-82 and $246.60/t in 1980-81. For durum wheat, CWB prices averaged $202.00/t for No. 1 CWAD wheat in 1982-83, compared to an average of $213.70/t in 1981-82 and $284.40/t in 1980-81.

CANADIAN OUTLOOK - 1983-84

Canadian wheat production for 1983-84 is estimated at 26.9 Mt, marginally higher than last year's production of 26.8 Mt (Table 3). Total wheat supply for 1983-84 is estimated at 36.9 Mt, 1% larger than last year.

Domestic use is expected to be the same as last year at 5.2 Mt, while wheat exports are forecast to decline 4% to 20.5 Mt, partly because of lower total wheat imports by the USSR and China in 1983-84. Although wheat exports are predicted to decline from last year's record 21.4 Mt, the 20.5 Mt figure would still top the previous record of 18.4 Mt

in 1981-82. End-of-year wheat stocks for 1983-84 are expected to increase by 1.2 Mt to 11.2 Mt. Although this would be the largest carryover since 1978-79, when utilization is taken into account (domestic use plus exports), such stocks are not large in comparison with most years of the past decade.

Because of the large supplies of wheat in each of the major wheat exporting countries, prices for No. 1 CWRS 13.5% protein wheat in store at Thunder Bay are expected to average in the $205-$215/t range. The upper end of the range represents a 5% increase from the 1982-83 average price of $204.60/t. CWB prices for this grade of wheat have averaged about 5% higher in the first four months of this crop year as compared to the same period last year.

The supply of durum wheat in Canada in 1983-84 is down 12% from last year's level because of lower carryin stocks and a 15% decline in production. Because of tighter supplies and lower durum wheat imports by the Soviet Union, Canadian durum wheat exports are forecast to decline to 2.4 Mt from last year's record 2.7 Mt. Given forecast domestic use of 450 000 t, durum wheat stocks are projected to be less than 1 Mt at the end of 1983-84, low in comparison to stock levels of recent years. Because of tighter world supplies of durum wheat, particularly in the United States and Canada, together with a predicted increase in world import demand, CWB durum wheat prices at Thunder Bay have averaged approximately 20% higher in the first four months of the 1983-84 crop year as compared to the same period last year. For the 1983-84 crop year, the price for No. 1 CWAD wheat in store at Thunder Bay is forecast to average in the $225-$240/t range, an increase of 11-19% from the 1982-83 average price of $202.00/t.

CANADIAN OUTLOOK - 1984-85

In Canada, the total area seeded to wheat is expected to decline. The extra area is expected to be seeded to barley and rapeseed since prices for these two commodities have increased sharply against spring wheat in 1983-84. However, the area seeded to durum wheat in 1984-85 is predicted to increase from 1983-84, since carry-over stocks of durum wheat are forecast to decline 17% this year. In addition, durum wheat prices are substantially higher than year-earlier levels. Given a predicted seeded area of 12.5 Mha for all types of wheat and a normal yield of 1920 kg/ha, total wheat production in Canada in 1984-85 is projected to be 24 Mt. This compares with a seeded area of 13.70 Mha, a yield of 1965 kg/ha, and a production of 26.9 Mt in 1983-84. In 1984-85 the total supply of wheat in Canada is forecast to be 35.2 Mt, 5% lower than this year.

TABLE 1. ESTIMATED SUPPLIES AND UTILIZATION OF WHEAT IN MAJOR EXPORTING AND IMPORTING COUNTRIES, CROP YEARS (Mt)

	Major exporters			Major importers		
	1981-82	1982-83	1983-84 Forecast	1981-82	1982-83	1983-84 Forecast
	United States			USSR		
Beginning stocks	26.9	31.7	42.0	N/A	N/A	N/A
Production	76.2	76.4	65.5	80.0	85.0	80.0
Imports	0.1	0.2	0.1	19.5	20.0	18.0
Total supply	103.2	108.3	107.6	N/A	N/A	N/A
Domestic use	23.2	25.2	29.4	99.0	104.5	97.5
Exports	48.3	41.1	38.1	0.5	0.5	0.5
Ending stocks	31.7	42.0	40.1	N/A	N/A	N/A
	Canada			China		
Beginning stocks	8.6	9.8	10.0	N/A	N/A	N/A
Production	24.8	26.8	26.9	59.6	68.4	78.0
Imports	-	-	-	13.2	13.0	12.0
Total supply	33.4	36.5	36.9	N/A	N/A	N/A
Domestic use	5.2	5.2	5.2	72.8	81.4	90.0
Exports	18.4	21.4	20.5	-	-	-
Ending stocks	9.8	10.0	11.2	N/A	N/A	N/A
	Argentina			Eastern Europe		
Beginning stocks	0.5	0.5	1.3	N/A	N/A	N/A
Production	8.1	15.1	13.0	30.5	34.7	33.8
Imports	-	-	-	6.3	4.1	4.0
Total supply	8.6	15.6	14.3	N/A	N/A	N/A
Domestic use	4.3	4.5	4.5	35.4	36.5	36.0
Exports	3.8	9.8	9.0	1.9	2.3	1.5
Ending stocks	0.5	1.3	0.8	N/A	N/A	N/A
	Australia			Egypt		
Beginning stocks	2.2	4.9	2.5	0.3	0.4	0.4
Production	16.3	8.9	20.0	1.9	2.0	2.0
Imports	-	-	-	5.8	6.0	6.0
Total supply	18.5	13.8	22.5	8.0	8.4	8.4
Domestic use	2.8	4.0	3.5	7.7	8.0	8.0
Exports	10.8	7.3	13.0	-	-	-
Ending stocks	4.9	2.5	6.0	0.4	0.4	0.4

(continued)

TABLE 1. (Concluded)

	Major exporters			Major importers		
	1981-82	1982-83	1983-84 Forecast	1981-82	1982-83	1983-84 Forecast
	EEC[3]			Brazil		
Beginning stocks	7.3	6.3	11.0	0.6	0.9	0.5
Production	54.4	59.6	58.9	2.2	1.8	1.9
Imports	4.7	3.6	4.5	4.4	4.1	4.4
Total supply	66.4	69.5	74.4	7.2	6.8	6.8
Domestic use	44.6	43.5	48.5	6.3	6.3	6.3
Exports	15.5	15.0	15.5	-	-	-
Ending stocks	6.3	11.0	10.4	0.9	0.5	0.5
	Total major exporters			Total major importers		
Beginning stocks[1]	45.5	53.2	66.8	N/A	N/A	N/A
Production	179.8	186.8	184.3	174.2	191.9	195.7
Imports[2]	4.8	3.8	4.6	49.2	47.2	44.4
Total supply	230.1	243.7	255.7	N/A	N/A	N/A
Domestic use	80.1	82.4	91.1	221.2	236.7	237.8
Exports[2]	96.8	94.6	96.1	2.4	2.8	2.0
Ending stocks	53.2	66.8	68.5	N/A	N/A	N/A
Ending stocks/ utilization	30	38	37	N/A	N/A	N/A

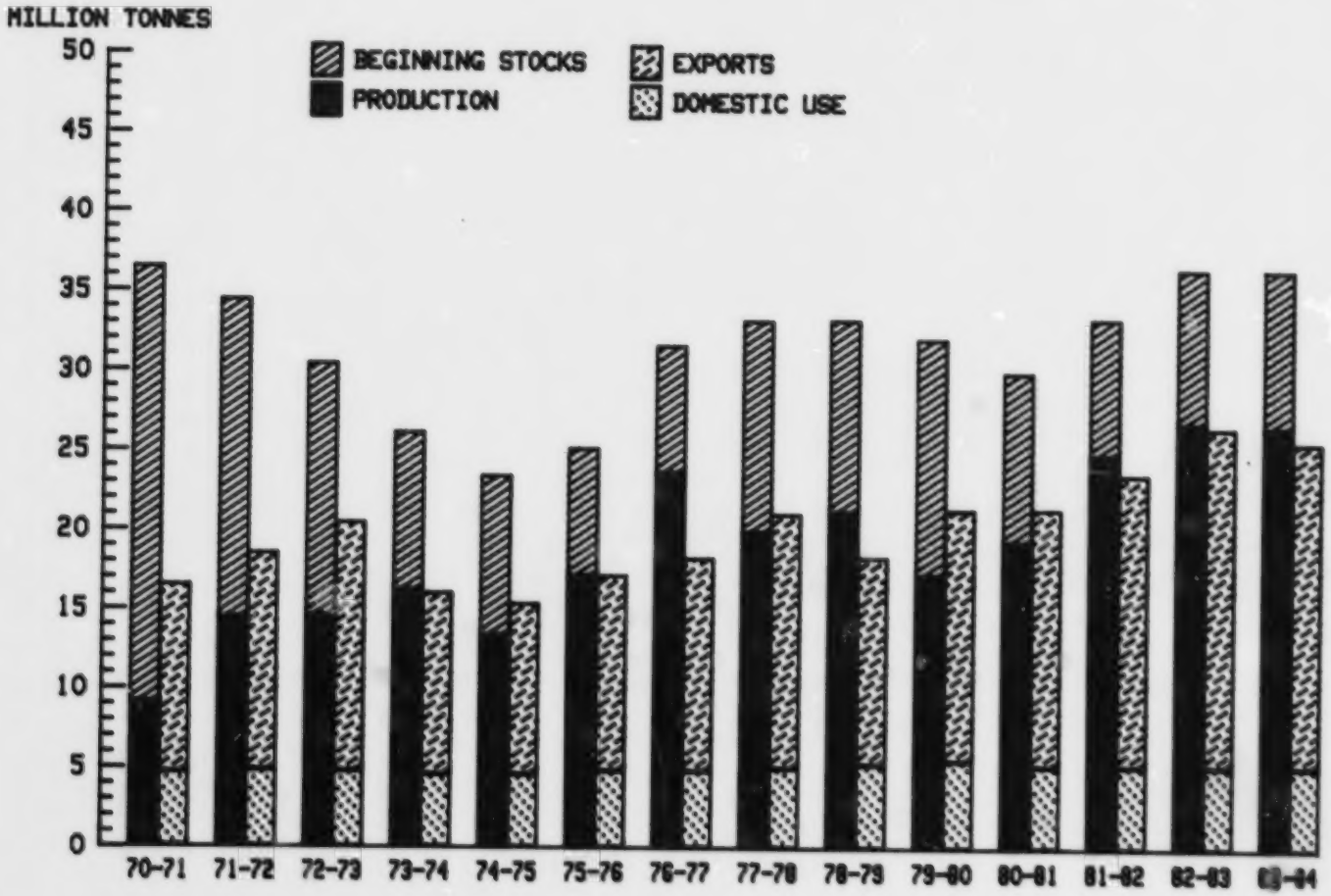
	World Total		
	1981-82	1982-83	1983-84 Forecast
Beginning stocks	79	86	97
Production	449	479	483
Total supply	528	565	580
Trade	101	98	101
Domestic use	442	468	478
Ending stocks	86	97	102
Ending stocks/ utilization	19	21	21

[1]Starting dates for crop years differ by country or region. Stocks include inventories in all positions.
[2]Trade data include wheat flour in wheat equivalent.
[3]Excluding trade between the 10 EEC member countries

Sources: Statistics Canada, Canadian Grain Commission, International Wheat Council, Australian Wheat Board, USDA and Agriculture Canada

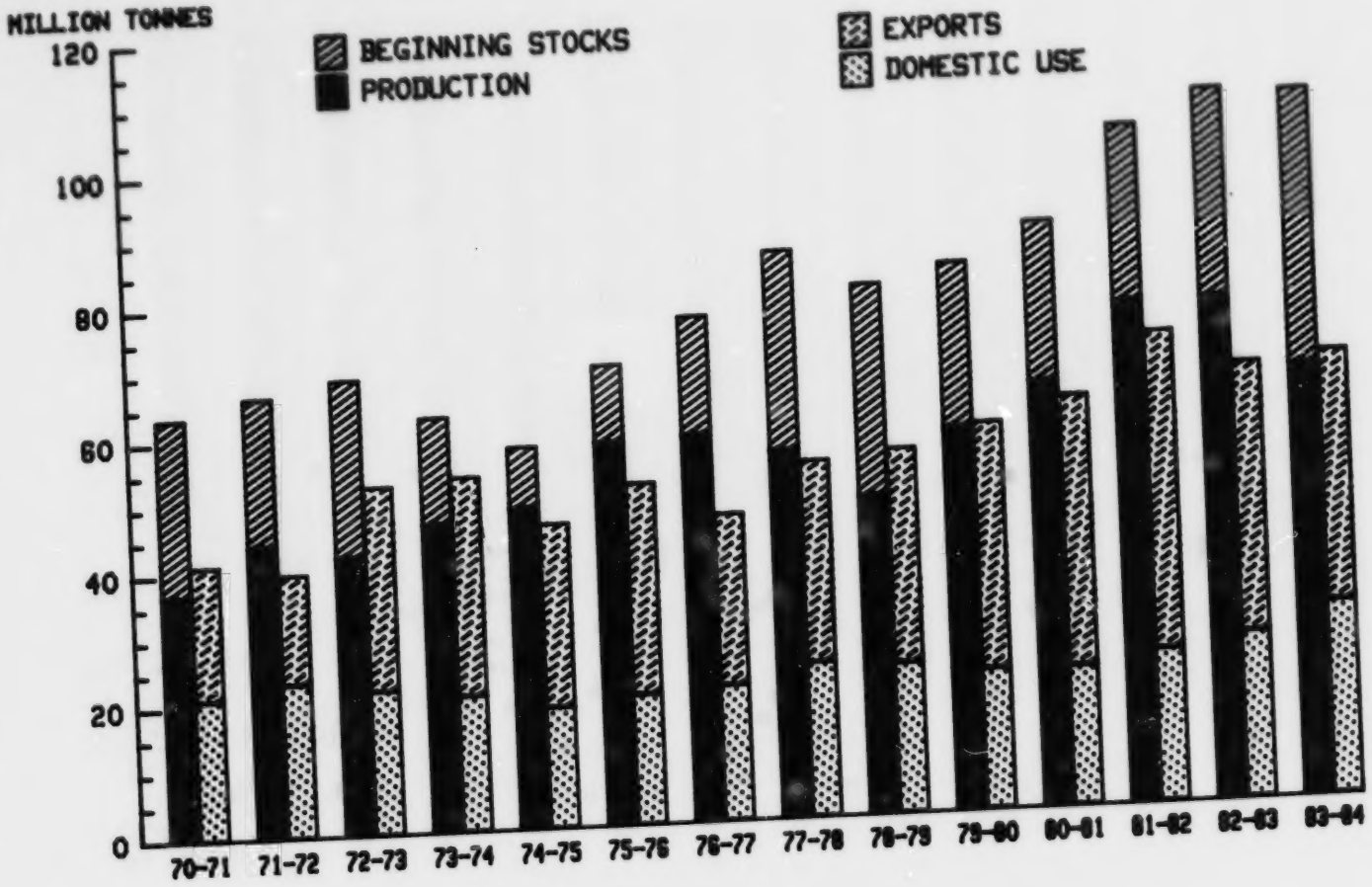
NOTE: Total computed from unrounded tables

WHEAT SUPPLY AND DISAPPEARANCE, CANADA



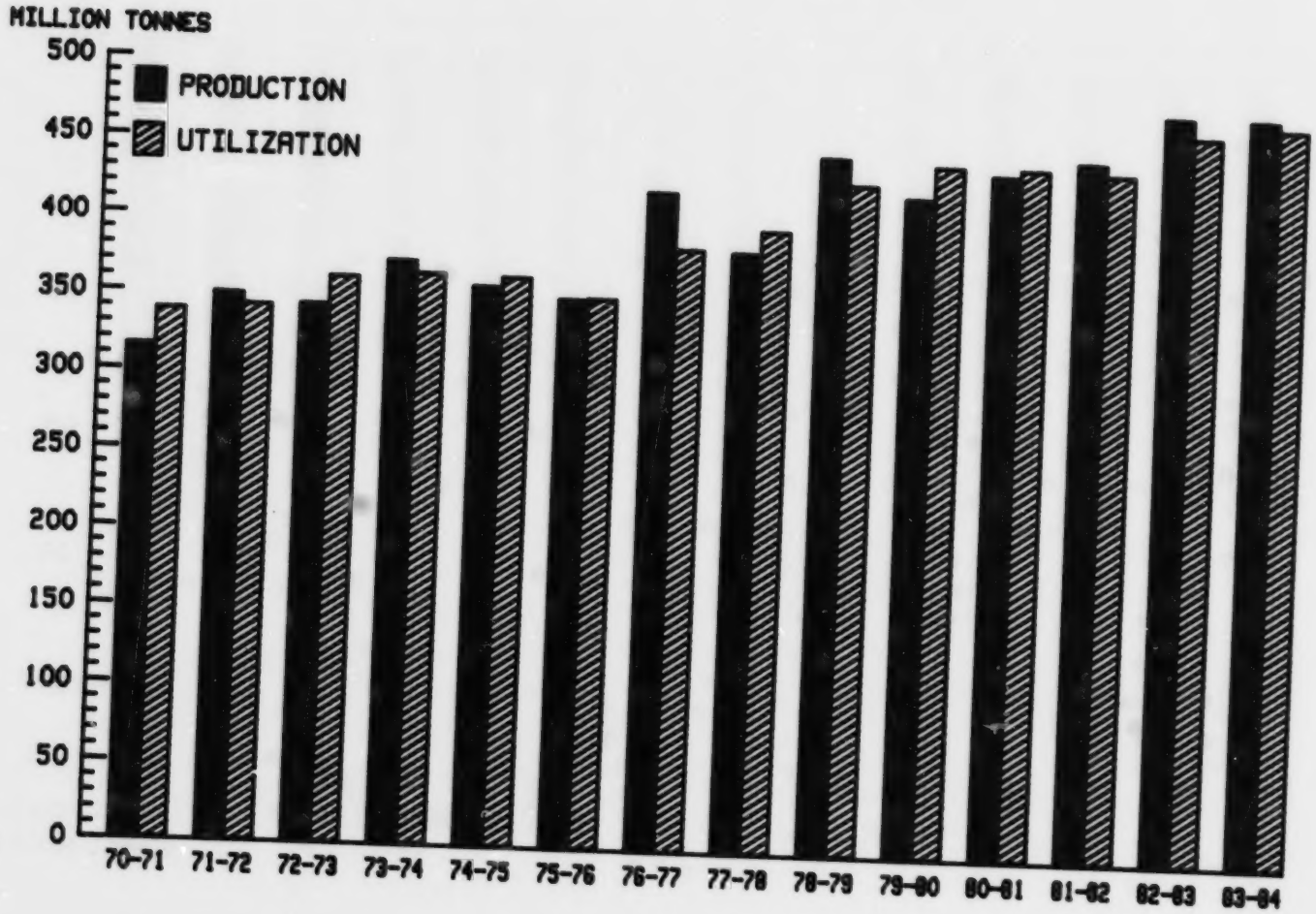
SOURCE: STATISTICS CANADA, CANADIAN GRAIN COMMISSION

WHEAT SUPPLY AND DISAPPEARANCE, UNITED STATES



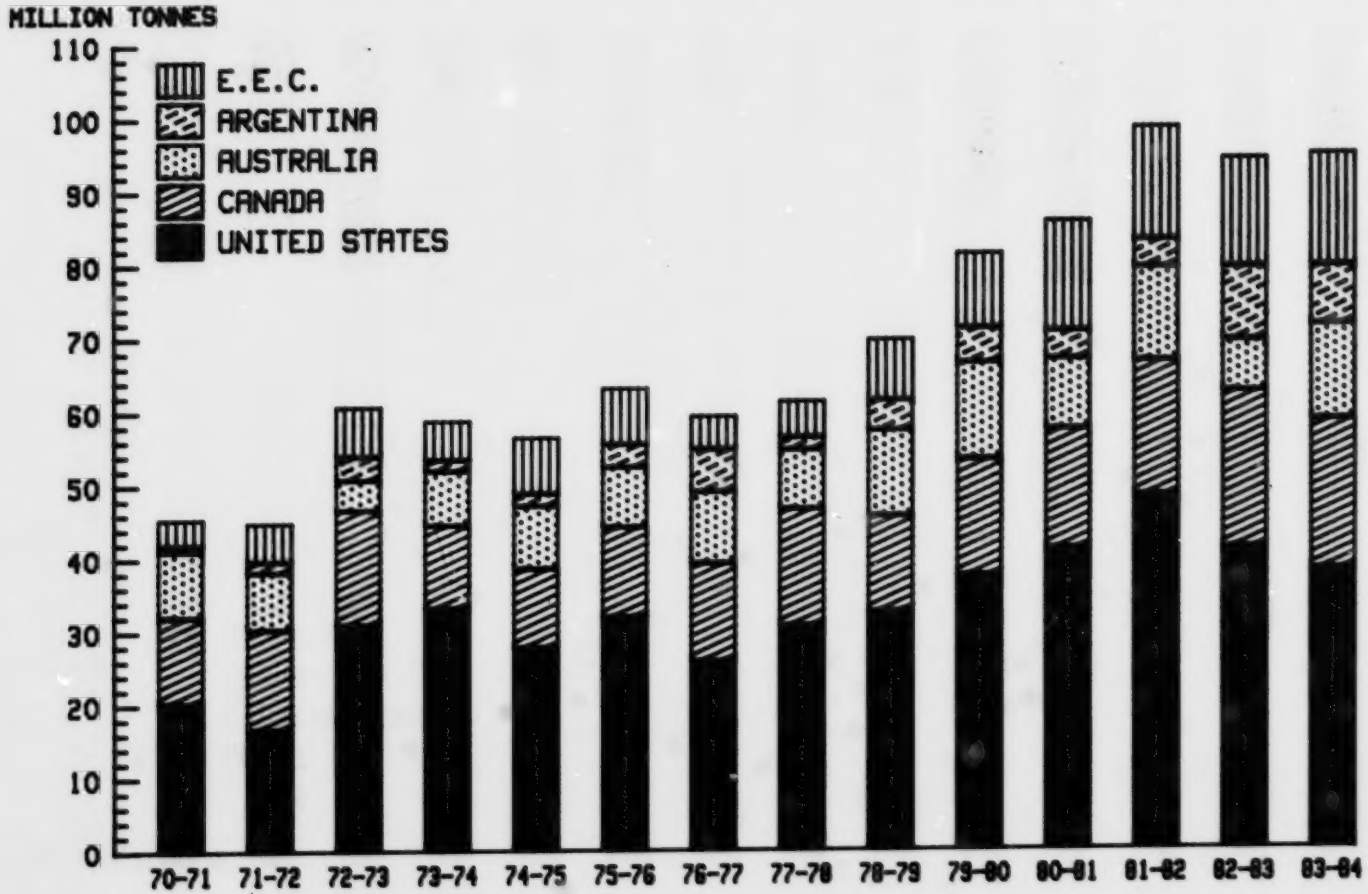
SOURCE: UNITED STATES DEPARTMENT OF AGRICULTURE

WORLD WHEAT PRODUCTION AND UTILIZATION, 1970-71 TO 1983-84



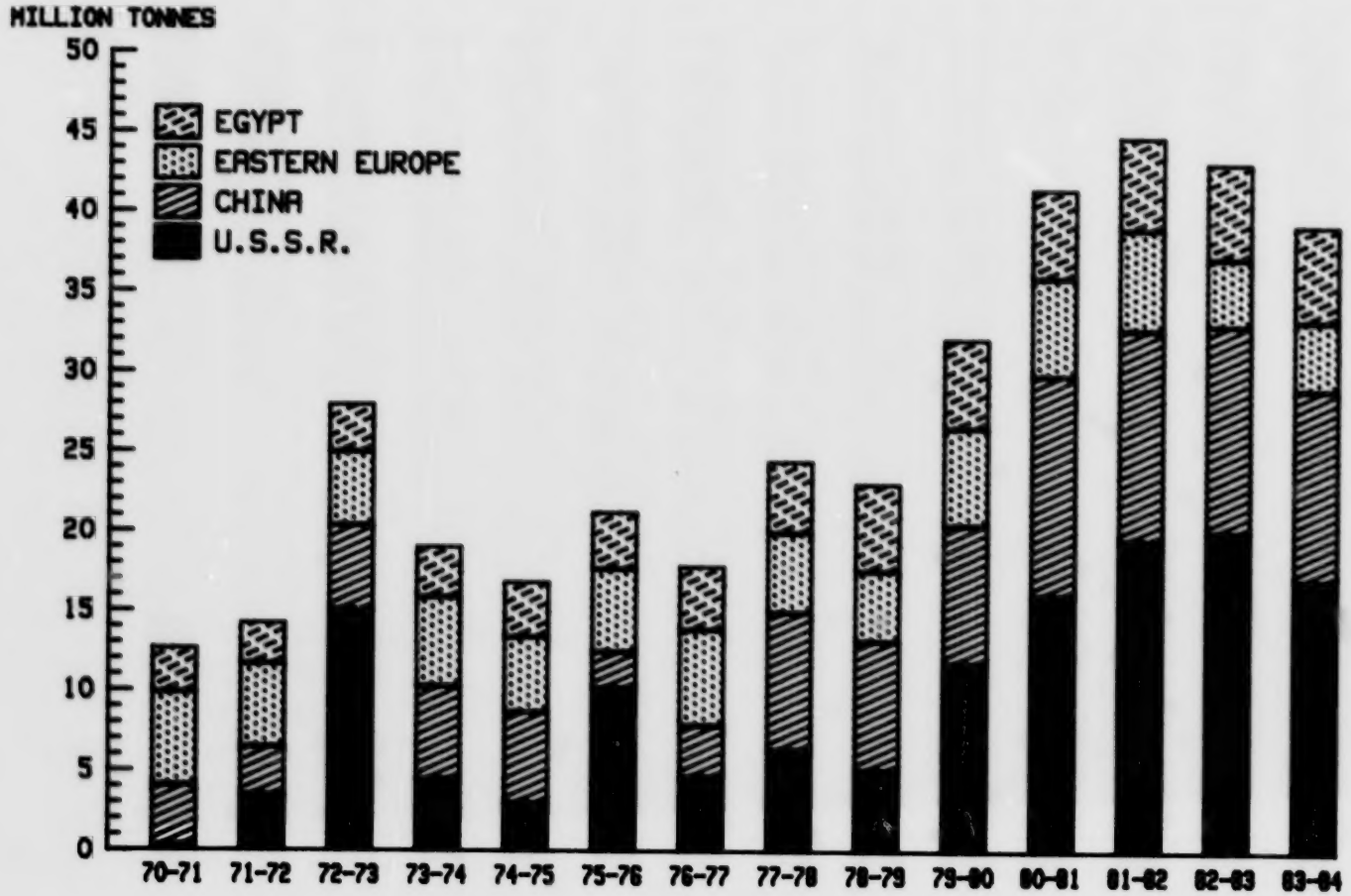
SOURCE: UNITED STATES DEPARTMENT OF AGRICULTURE

WHEAT EXPORTS, CANADA, ARGENTINA, AUSTRALIA, E.E.C. AND UNITED STATES



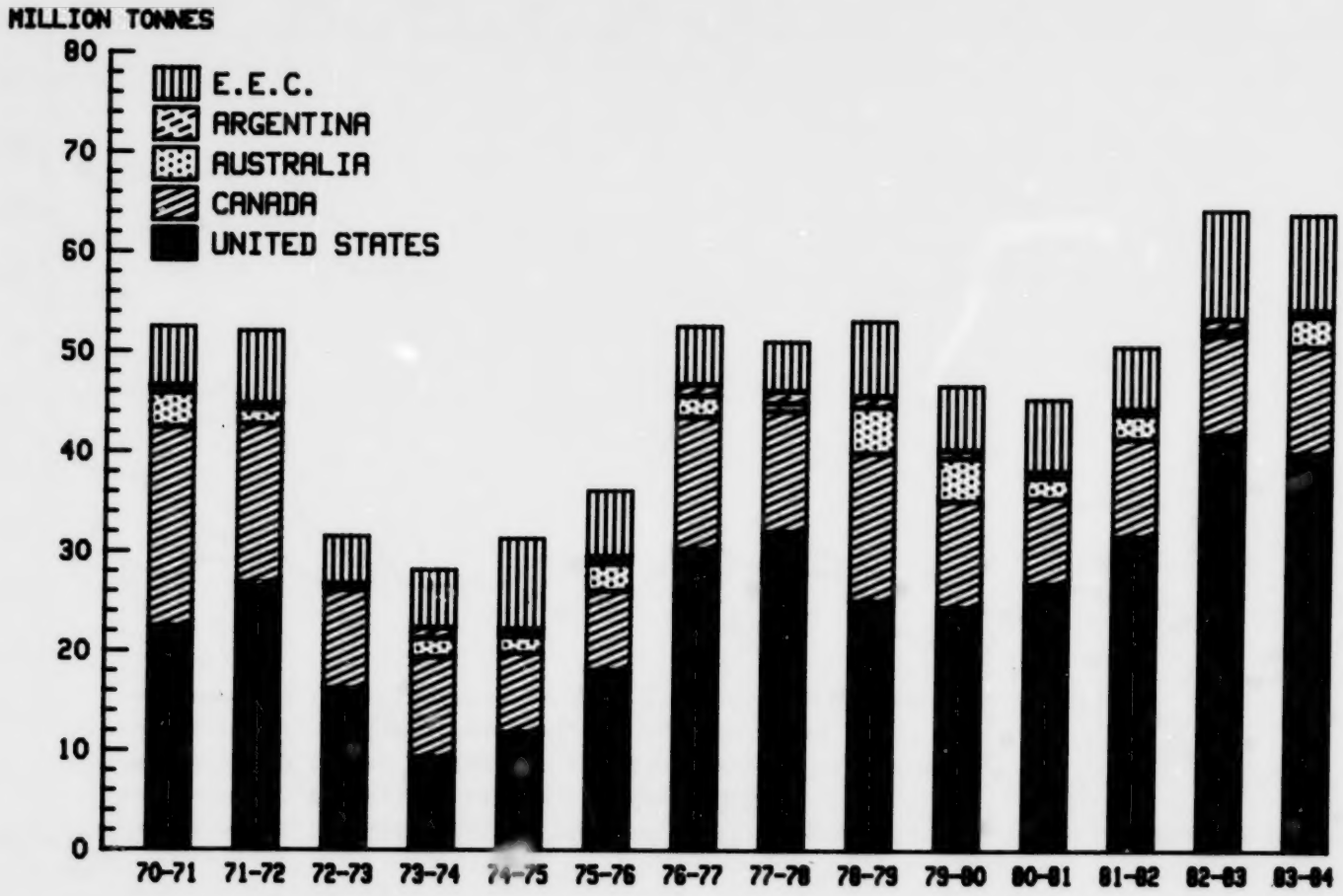
SOURCE: INTERNATIONAL WHEAT COUNCIL

WHEAT IMPORTS, U.S.S.R., CHINA, EASTERN EUROPE AND EGYPT



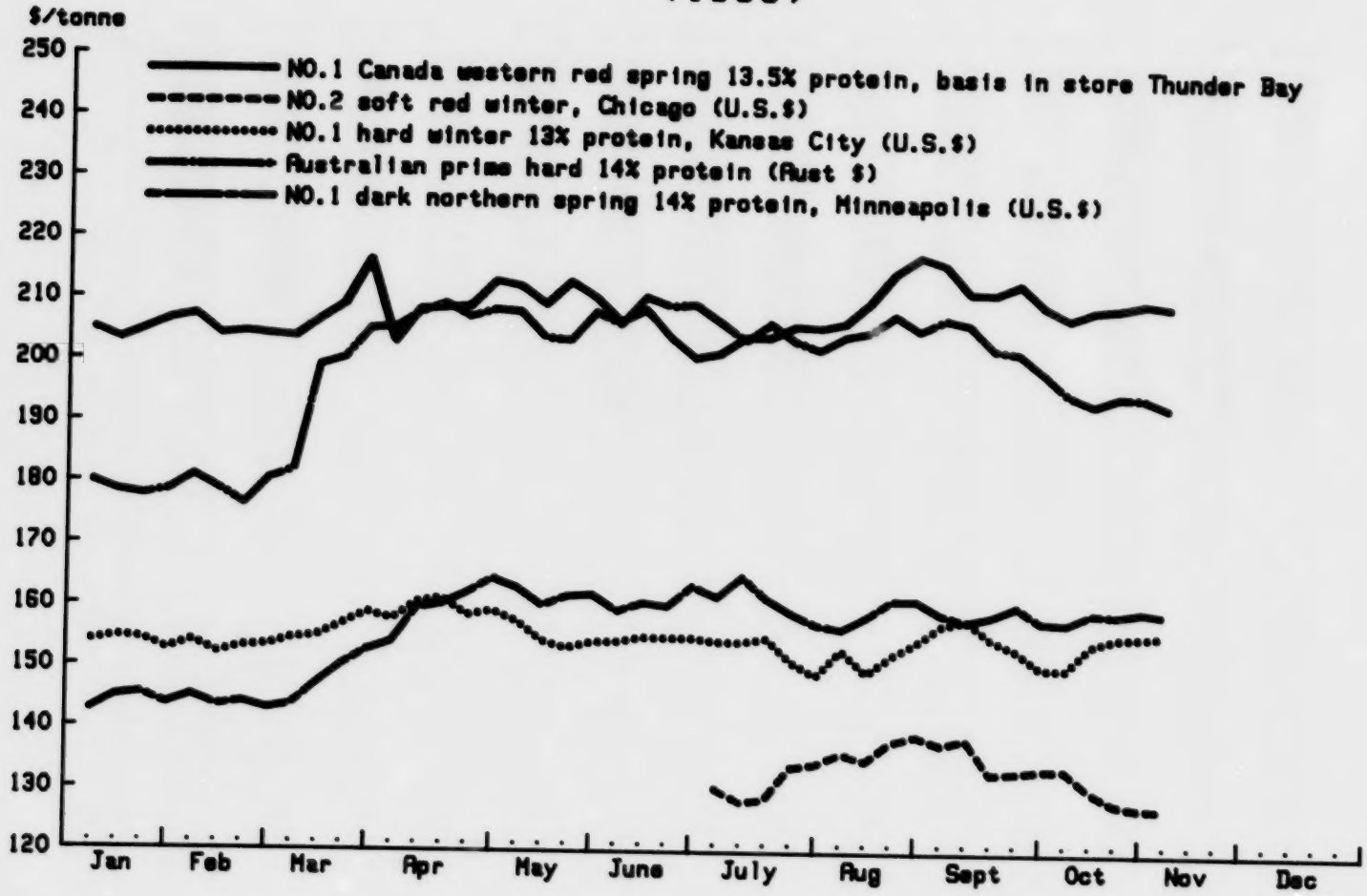
SOURCE: INTERNATIONAL WHEAT COUNCIL

ENDING WHEAT STOCKS, CANADA, ARGENTINA, AUSTRALIA, E.E.C. AND UNITED STATES

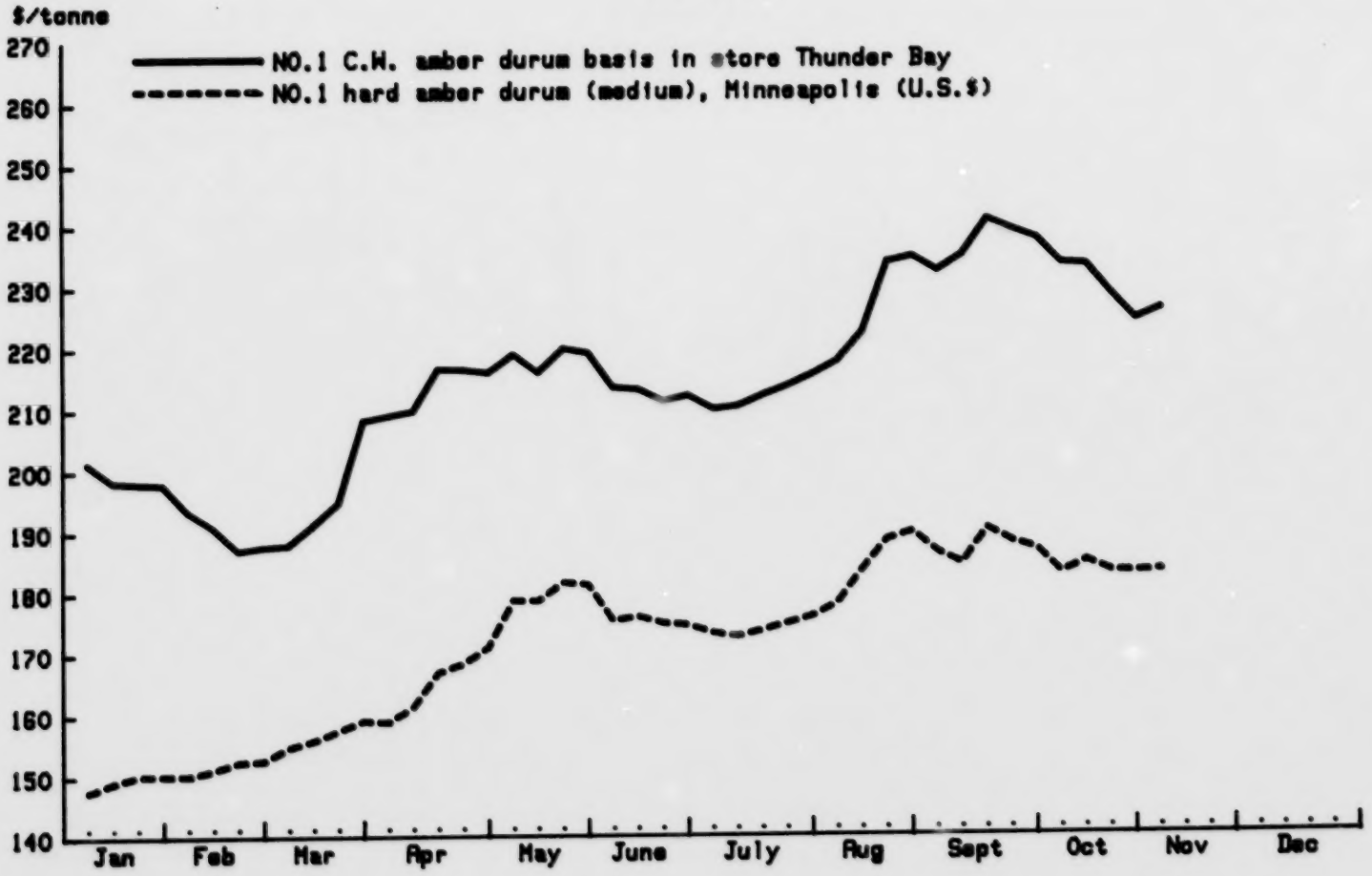


SOURCE: INTERNATIONAL WHEAT COUNCIL

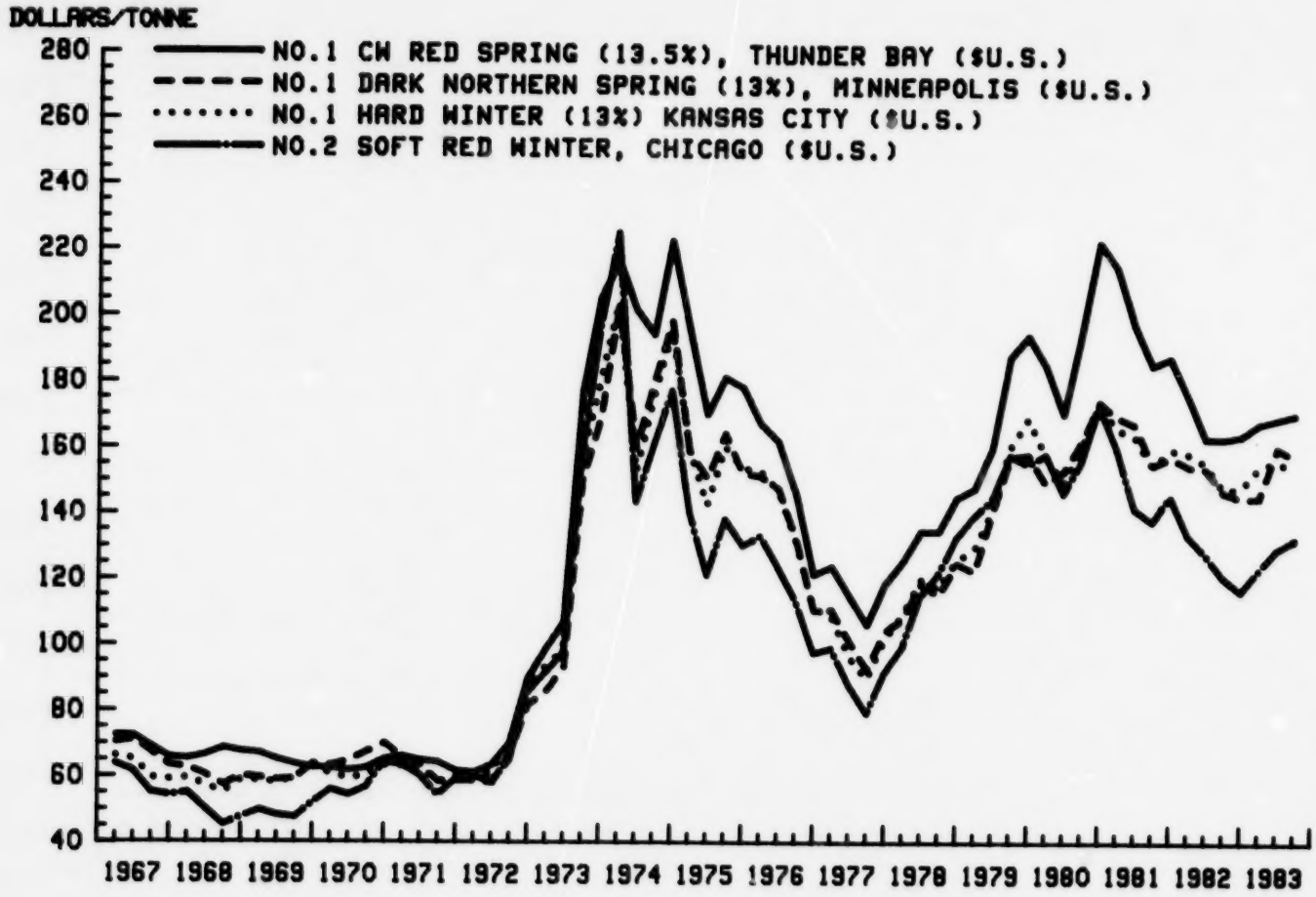
WEEKLY AVERAGE WHEAT PRICES
(1983)



WEEKLY AVERAGE DURUM WHEAT PRICES
(1983)



WHEAT PRICES, CANADA AND UNITED STATES, 1967 TO 1983



SOURCE: CANADIAN GRAIN COMMISSION AND UNITED STATES DEPARTMENT OF AGRICULTURE

COARSE GRAINS

A. Daoust

HIGHLIGHTS

World coarse grain supplies were abundant in 1982-83, due mainly to excessive U.S. supplies, and a weakening demand caused prices to decrease sharply in the first half of 1982-83. Heavy participation by farmers in the U.S. reserve and PIK programs brought support to rising prices in the second half of 1982-83. The drought in the U.S. further reduced 1983 coarse grain production, and, consequently, U.S. coarse grain production dropped 47% from the 1982-83 level. Drought conditions also reduced coarse grain production in Canada and parts of Europe. As a result, coarse grain supplies are much reduced, while trade is expected to remain at around the 1982-83 level. Exports by the major exporters in 1983-84 are expected to rise because of reduced availabilities from some other exporters. Carryover stocks are forecast to be reduced by half and average prices to be 25-35% higher than in 1982-83.

In Canada, after a record crop and relatively depressed prices in 1982-83, 1983 coarse grain production is forecast to drop 22% due to reduced area and reduced yields caused by drought conditions during part of the season. Relatively strong domestic demand, coupled with increased exports, mainly of barley, is expected to lower stocks and keep average prices firm at levels 35-45% above 1982-83 levels.

WORLD REVIEW - 1982-1983

In 1982-83, world coarse grain markets were dominated by a record U.S. crop for the second year in a row. Large supplies at the world level were almost all the result of excessive U.S. supplies. Trade dropped again in 1982-1983, due mainly to reduced import demand from the USSR, Eastern Europe and the EEC, whose domestic outputs increased. On the other hand Mexico had to increase its imports in response to a much smaller crop caused by drought. South Korea and Taiwan continued to represent expanding markets. The 5 major exporters saw their export volume decrease; a drought-reduced crop in Australia and South Africa adversely affected their export availabilities. In the U.S., despite a significant increase in feed usage, carryover stocks grew 38% to 98 Mt.

In the United States, depressed prices caused by burdensome supplies at harvest gradually induced heavy participation by farmers in the reserve program, thus giving support to prices. Also, fearing persistent escalation in the cost of its farm programs, the U.S. Government introduced the PIK program last February which succeeded in reducing the area seeded to corn by 27%. This, along with drought conditions this past summer, provided more support to the price rise. On a crop-year basis (August-July), the U.S. corn price averaged U.S. $106/t in 1982-83, unchanged from a year earlier.

WORLD OUTLOOK - 1983-1984

World production is expected to reach approximately 693 Mt, almost 91 Mt or 12% below the 1982-83 record high level (Table 2). Of major importance to this decline is U.S. coarse grain production, which is estimated to be 136 Mt, 47% below last year, as a result of the PIK program and the drought. Among the 5 other major exporters, Canada's production is also down, while Argentina's production is expected to reach a level similar to that of last year. South African and Australian production should recover from last year's drought. Higher production is more certain for Australia's most important coarse grain, barley, which is harvested in December. USSR production of coarse grains, including miscellaneous grains, is estimated at 120 Mt, 26 Mt higher than last year. Eastern Europe and EEC production is lower due to dry weather last summer.

World coarse grain supplies in 1983-84 are expected to reach 831 Mt, down 7% from the 1982-83 level. Higher beginning stocks are partially offsetting the 12% drop in production. Again, the reduction in U.S. coarse grain supplies is the most important factor contributing to the world decline; the estimated U.S. coarse grain supply of 234 Mt is down 28% from last year's level.

World coarse grain utilization for 1983-84 is forecast to grow only slightly. A sharp drop in coarse grain demand in the U.S. is forecast by USDA because of high feed grain prices and low prices for livestock; wheat feeding will also increase because of price and availability factors. On the other hand, increased coarse grain utilization is expected in the USSR due to higher production.

Several factors will prevent world trade from growing significantly in 1983-84: financial difficulties and credit availability for many importers in a period of slow economic recovery; the high value of the U.S. dollar, combined with higher coarse grain prices; and large supplies of wheat which will prompt an increase in its use in livestock feeding, notably in the EEC. For economic reasons some importing countries will at times substitute coarse grain imports for wheat.

For the major importing countries, the USSR is expected to reduce its coarse grain imports, but only slightly. Improved coarse grain crops in this country will allow increased feeding to livestock and will also reduce the amount of wheat fed. EEC imports will likely rise due to the drought-reduced crop, and its exports will be reduced. Wheat usage for feed in the EEC is also expected to rise significantly, due to ample supplies and lower quality wheat in some areas. A drop in Eastern European countries' crops will also increase their imports. However, the size of their debt will limit the increase in import demand. Also of importance to international trade changes is the fact that South Africa needs to import around 2.5 Mt following its

disastrous crop last year. Most of thes imports will be realized in 1983-84 (July-June). In addition, following a reduced corn crop, Brazil imports of coarse grains will be increased and their exports curtailed. On the other hand, China is expected to reduce its coarse grain imports because of its improved crops. Mexico will still buy a significant though lesser amount of coarse grains because of its much improved crops.

Exports from the four major exporters (U.S., Argentina, Canada and Australia) are forecast to be up from 1982-83 levels given reduced availabilities from other exporters. Of significant importance in the months to come will be crop development in the exporting countries from the southern hemisphere, namely, Argentina, Australia, South Africa and Brazil. These crops will be available in the second half of 1983-84.

Trade prospects for barley have changed dramatically from last crop year mainly because of the EEC barley crop shortfall. Last year, the EEC was the second largest barley exporter behind Canada. The EEC will see a significant drop in its exportable supplies. Moreover, because of a more significant drop in malting barley production, the EEC is also a buyer of malting barley this year. Production of barley in the 5 major exporting countries (Canada, EEC, Australia, U.S. and Turkey) will be reduced by 7.5 Mt. World barley trade is expected to remain close to or slightly above last years's level; increased imports by the EEC, Middle East and Eastern Europe are expected, while Japanese imports of barley should be similar to last year. Imports of barley by the USSR are expected to decline. Exports of Canadian barley are expected to increase, along with greater movement in Australian and U.S. barley, while barley exports from the EEC and Turkey will decline due to a crop shortfall.

The large carryover stocks that we have seen in the two previous years will be reduced by 54% to 63 tonnes by the end of 1983-84, representing 8% of total utilization compared to 18% a year ago. Most of the decline will occur in the U.S. where coarse grain carryover stocks are forecast at 22.7 Mt, down from 98 Mt in 1982-83.

U.S. corn prices reached a high at the beginning of September and subsequently eased somewhat. It is expected that prices will firm up in the first quarter of 1984 to ration demand, possibly starting to fall during the second quarter as supplies from the southern hemisphere become available. The season average (August-July) price for corn is forecast between U.S. $135 and $145/tonne, an increase of 25-35%.

WORLD OUTLOOK - 1984-85

The 1984 U.S. program for feed grains announced in October includes a voluntary 10% acreage reduction. Early estimates call for an increase in seeded area for corn to 80 million acres (even with a moderate

participation in the program), an area almost as large as in 1982. Therefore, corn production could exceed 200 or even 210 Mt. World trade is expected to increase only slowly in accordance with economic activity in developing countries and repayment of debts will be a high priority for many debt-ridden countries. Therefore, we should see a certain rebuilding of coarse grain stocks in the U.S. However, the U.S. government is unlikely to let surpluses build up at its expense. Prices should decline in 1984-85 to a level 10-20% lower than in 1983-84.

CANADIAN REVIEW - 1982-83

Coarse grain production in 1982-83 reached a record high of 26.7 t. Barley and oats production was up while corn and rye output declined slightly. Domestic use of coarse grains increased by 0.8 Mt. The main increase was due to higher feed usage as a result of lower prices and expansion in the hog sector. Feed (including waste and dockage) usage increased 4% in 1982-83.

Exports of Canadian coarse grains declined from 7.8 to 6.6 Mt in 1982-83 due to a shrinking demand. Lower exports to the Soviet Union were partially offset by increased sales to East Germany and Spain.

Prices for coarse grains were generally depressed on the domestic market throughout 1982-83. Corn prices, although depressed during the fall, rose during spring and summer in line with U.S. corn prices.

CANADIAN OUTLOOK - 1983-84

Statistics Canada's December survey forecasts a coarse grain production of 21.3 Mt, down 20% from last year's level, due to a combination of lower area and lower yields. Higher beginning stocks than last year partially offset the much reduced crops, and domestic supplies amount to 29.8 Mt, a 10% drop from last year's record supply of 33.2 Mt.

Domestic use of coarse grains is expected to be down slightly in 1983-84. Demand for feed is expected to remain relatively strong; hog production has expanded and no turnaround in production is expected until the second half of 1984. A slight increase in poultry production is also expected in 1984. The only negative factor is the reduced number of steers and heifers on feed and the resultant continued lower beef output.

Domestic use of barley is expected to remain high in 1983-84; reduced supplies of barley in eastern Canada (including Ontario) should be offset by increased shipments of western barley to the eastern market. Increased shipments will continue as long as off-Board barley prices

remain at a discount to corn formula. Demand for barley in western Canada is expected to increase in 1983-84, given the expansion in hog production. Corn usage for feed is expected to be up in eastern Canada because of reduced supplies of other feed grains in the region.

Exports of Canadian coarse grains are forecast to surpass the 1982-83 level. Because of favorable demand, barley exports are forecast to reach 6.3 Mt; barley exports this season to November 2 are 40% above last year. However, due to reduced supplies and a strong domestic demand, barley exports will likely be constrained by available supplies. Corn exports will be small this year due to reduced supplies. On the other hand, rye exports are likely to reach a record high, given abundant supplies and a strong import demand for rye as a feed grain replacement.

Because of relatively tight supplies in Canada and in the U.S., coarse grain prices have climbed significantly above last years's level; 1983-84 domestic prices are expected to average 35-45% above the 1982-83 average. Because of tight supplies, barley prices (off-Board) should reach and maintain a par value with corn (on a feed-value basis). The export price of barley is expected to remain strong; the average selling price by the Canadian Wheat Board is expected to be $155-170 for 1983-84.

CANADIAN OUTLOOK - 1984-85

The area seeded to coarse grains is likely to rebound next spring because of a sharp decrease in carryover stocks by the end of 1983-84 and prices expected to be higher than those prevailing last spring. In the prairies, prices for off-Board barley and oats next spring, compared to wheat (initial price), should be much higher than a year earlier. Also, initial prices are likely to be more favorable to coarse grain plantings. The area seeded to barley for grain is forecast at 5.3 Mha, up 19% from last year and the area seeded to oats for grain at 1.6 Mha, an increase of 12%; these increases will be at the expense of wheat area. The area seeded for grain corn in eastern Canada is forecast to increase 10% to nearly 1.2 Mha. The area seeded to corn in Ontario should increase due to higher prices, while the trend of corn area expansion in Quebec is expected to continue.

Considering normal yields, 1984 coarse grain production is forecast to reach 24.9 Mt, up 17% from this year. However, due to much reduced beginning stocks in 1984-85, domestic supplies will grow only marginally to 29.8 Mt. Increased supplies of corn in eastern Canada will be partially offset by a further decrease in western barley supplies. Domestic demand is projected to be reduced, mainly because of an anticipated lower pork and beef output. Exports are expected to be down. Prices for coarse grains in Canada are expected to fall somewhat from 1983-84 levels.

TABLE 2. ESTIMATED SUPPLIES AND UTILIZATION OF COARSE GRAINS[1] IN MAJOR EXPORTING AND IMPORTING COUNTRIES, CROP YEARS (Mt)

	Major exporters			Major importers		
	1981-82	1982-83	1983-84 Forecast	1981-82	1982-83	1983-84 Forecast
	United States			USSR[4]		
Beginning stocks	34.6	71.1	98.1	N/A	N/A	N/A
Production	249.0	255.5	136.0	80.0	94.0	120.0
Imports	0.3	0.3	0.3	26.5	12.5	11.0
Total supply	283.9	326.9	234.4	N/A	N/A	N/A
Domestic use	154.2	175.5	156.4	106.0	106.0	131.0
Exports	58.6	53.3	55.3	-	-	-
Ending stocks	71.1	98.1	22.7	N/A	N/A	N/A
	Canada			Mexico		
Beginning stocks	5.5	6.5	8.6	4.6	2.2	1.0
Production	26.0	26.7	21.3	17.3	10.5	14.5
Imports	0.8	0.8	0.6	1.6	7.5	5.0
Total supply	32.3	34.0	30.5	23.5	20.2	20.5
Domestic use	18.0	18.8	18.4	21.3	19.0	19.5
Exports	7.8	6.6	7.2	-	-	-
Ending stocks	6.5	8.6	4.9	2.2	1.0	1.0
	Argentina			Eastern Europe		
Beginning stocks	0.4	0.6	0.6	N/A	N/A	N/A
Production	18.4	17.7	17.5	62.8	70.0	64.4
Imports	-	-	-	7.7	3.9	4.5
Total supply	18.8	18.3	18.1	N/A	N/A	N/A
Domestic use	6.6	6.7	6.7	69.5	71.4	66.9
Exports	11.6	11.0	11.0	1.1	2.5	2.0
Ending stocks	0.6	0.6	0.4	N/A	N/A	N/A
	Australia			Japan		
Beginning stocks	0.6	0.5	0.3	2.1	1.8	1.7
Production	6.7	3.7	8.4	0.4	0.4	0.4
Imports	-	-	-	18.4	18.5	18.3
Total supply	7.3	4.2	8.7	20.9	20.7	20.4
Domestic use	3.5	2.7	3.0	19.1	19.0	18.8
Exports	3.3	1.2	5.0	-	-	-
Ending stocks	0.5	0.3	0.7	1.8	1.7	1.6

(continued)

TABLE 2. (Concluded)

	Major exporters			Major importers		
	1981-82	1982-83	1983-84 Forecast	1981-82	1982-83	1983-84 Forecast
	South Africa			EEC[3]		
Beginning stocks	4.8	1.3	0.4	6.8	5.9	6.7
Production	8.8	4.3	10.5	67.8	71.3	63.0
Imports	-	2.5	-	9.5	7.5	9.5
Total supply	13.6	8.1	10.9	84.1	84.7	79.2
Domestic use	8.3	7.5	7.8	73.2	72.8	69.7
Exports	4.0	0.2	2.0	5.0	5.2	4.0
Ending stocks	1.3	0.4	1.1	5.9	6.7	5.5
	Total major exporters			Total major importers		
Beginning stocks[2]	45.9	80.0	108.0	N/A	N/A	N/A
Production	308.9	307.9	193.7	228.3	246.2	262.3
Imports	1.1	3.6	0.9	63.7	49.9	48.3
Total supply	355.9	391.5	302.6	N/A	N/A	N/A
Domestic use	190.6	211.2	192.3	287.1	288.2	305.9
Exports	85.3	72.3	80.5	6.1	7.7	6.0
Ending stocks[2]	80.0	108.0	29.8	N/A	N/A	N/A
Ending stocks/ utilization	29	38	11	N/A	N/A	N/A

	World total		
	1981-82	1982-83	1983-84 Forecast
Beginning stocks	80	112	138
Production	772	784	693
Total Supply	852	896	831
Trade	104	89	90
Domestic use	740	758	768
Ending stocks	112	138	63
Ending stocks/ utilization	15	18	8

[1]Coarse grains include corn, barley, oats, rye, and sorghum.
[2]Starting dates for crop years differ by country or region. The supply and disposition figures for all countries correspond to their respective crop years starting within a standard (Oct.-Sept.) crop year. Example: The crop year for Argentina corn for March 1983-Feburary 1984 is included in the 1982-83 crop year. Stocks include inventories in all positions.
[3]Excluding trade between the 10 EEC member countries
[4]Includes millet, buckwheat, rice, pulses and miscellaneous grains

Sources: Statistics Canada, Canadian Grain Commission, FAO, USDA and Agriculture Canada

NOTE: Total computed from unrounded tables

TABLE 3. SUPPLY AND DISPOSITION FOR CANADIAN GRAINS AND OILSEEDS ('000 t)

Grain and crop year	Beginning stocks	Production	Imports	Total supply	Exports[1]	Food and industrial use[2]	Other domestic use[3]	Total domestic use	Ending stocks	Average price[4]
	'000 tonnes									($/t)
Wheat										
1981-82	8 570	24 803	-	33 373	18 447	1 954	3 214	5 168	9 758	214.20
1982-83[6]	9 758	26 790	-	36 548	21 368	1 919	3 291	5 210	9 970	205.00
1983-84[7]	9 970	26 914	-	36 884	20 500	1 950	3 250	5 200	11 184	205.00-215.00
1984-85[8]	11 184	24 000	-	35 184	21 000	1 950	3 350	5 300	8 884	
Barley										
1981-82	3 203	13 724	2	16 929	6 012	406	6 350	6 756	4 161	123.90
1982-83[6]	4 161	14 074	-	18 235	5 670	387	6 968	7 355	5 210	100.10
1983-84[7]	5 210	10 616	-	15 826	6 300	400	6 950	7 350	2 176	135.00-145.00
1984-85[8]	2 176	13 100	-	15 276	5 800	400	6 500	6 900	2 576	
Corn										
1981-82	1 274	6 673	822	8 769	1 135	1 122	5 327	6 449	1 185	114.50
1982-83[6]	1 185	6 513	759	8 457	489	1 150	5 201	6 351	1 617	116.60
1983-84[7]	1 617	5 875	650	8 142	200	1 170	5 300	6 470	1 472	155.00-165.00
1984-85[8]	1 472	6 650	800	8 922	700	1 200	5 400	6 600	1 622	
Oats										
1981-82	760	3 188	12	3 960	51	75	2 979	3 054	855	121.40
1982-83[6]	855	3 684	-	4 539	105	80	3 265	3 345	1 089	94.90
1983-84[7]	1 089	2 773	-	3 862	90	75	3 100	3 175	597	130.00-140.00
1984-85[8]	597	3 200	-	3 797	60	80	2 900	2 980	757	
Rye										
1981-82	222	927	-	1 149	561	74	181	255	333	168.40
1982-83[6]	333	913	-	1 246	314	73	203	276	656	120.60
1983-84[7]	656	831	-	1 487	600	75	200	275	612	140.00-150.00
1984-85[8]	612	650	-	1 262	500	75	200	275	487	
Total coarse grains[5]										
1981-82	5 459	25 971	836	32 266	7 759	1 677	16 296	17 973	6 534	-
1982-83[6]	6 534	26 667	759	33 960	6 578	1 690	17 120	18 810	8 572	-
1983-84[7]	8 572	21 257	650	30 479	7 190	1 720	16 712	18 432	4 857	-
1984-85[8]	4 857	24 900	800	30 557	7 060	1 755	16 300	18 055	5 442	
Rapeseed/canola										
1981-82	1 328	1 849	-	3 177	1 359	945	180	1 125	692	326.40
1982-83[6]	692	2 246	-	2 938	1 271	904	285	1 189	478	310.0
1983-84[7]	478	2 681	-	3 159	1 400	1 050	300	1 350	409	370.0
1984-85[8]	409	2 800	-	3 209	1 350			1 350	509	
Flaxseed										
1981-82	344	468	-	812	448	N/A	N/A	105	259	357.90
1982-83[6]	259	734	-	993	429	N/A	N/A	101	463	290.0
1983-84[7]	463	465	-	928	500	N/A	N/A	175	253	365.0
1984-85[8]	253	550	-	803	450			150	203	
Soybeans										
1981-82	-	607	424	1 031	83	962	N/A	N/A	-	261.60
1982-83[6]	-	857	410	1 267	110	1 043	N/A	N/A	-	250.0
1983-84[7]	-	721	300	1 021	60	920	N/A	N/A	-	360.0
1984-85[8]	-	850	300	1 150	100	1 000				
All grains and oilseeds										
1981-82	15 701	53 698	1 260	70 659	28 096	N/A	N/A	N/A	17 243	-
1982-83[6]	17 243	57 294	1 167	75 706	29 756	N/A	N/A	N/A	19 483	-
1983-84[7]	19 473	52 038	950	72 471	29 650	N/A	N/A	N/A	16 703	-
1984-85[8]	16 703	53 100	1 100	70 903	29 960				15 038	

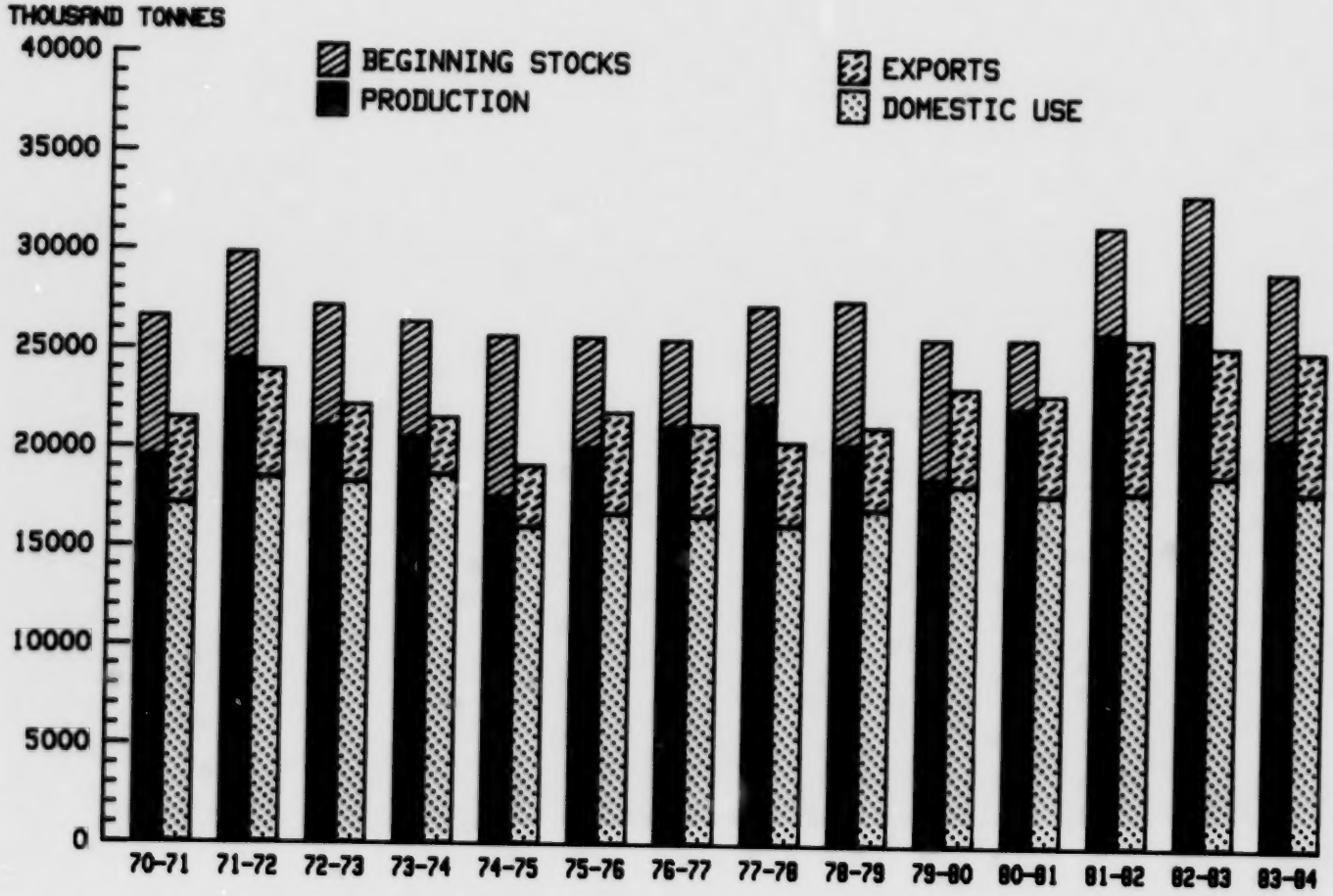
[1] Includes exports of wheat and barley products
[2] Includes rapeseed and flaxseed processed in Canada
[3] Includes feed, seed, handling losses, waste, and dockage
[4] Crop year average prices: wheat (No. 1 CWRS 13.5, Thunder Bay), barley (No. 1 Fd, WCE cash, Thunder Bay), corn (No. 2 CE, Chatham Elevator), oats (No. 1 Fd, WCE cash, Thunder Bay), rye (No. 1 CW, WCE cash, Thunder Bay), canola (No. 1 Canada, WCE cash, Vancouver), flaxseed (No. 1 CW, WCE cash, Thunder Bay), soybeans (No. 1, Chatham Elevator)
[5] Includes mixed grain production used as feed in 1981 through 1984 of 1459, 1483, 1162 and 1300 Mt respectively
[6] Estimate
[7] Forecast
[8] Projection

TABLE 4. AREA, YIELD AND PRODUCTION FOR CANADIAN GRAINS AND OILSEEDS

Grain and Crop Year	Area ('000 hectares)	Yield (kg/ha)	Production ('000 tonnes)
Wheat			
1981-82	12 426.6	1 996	24 802.5
1982-83	12 554.2	2 134	26 790.2
1983-84 Estimate	13 697.3	1 965	26 914.1
1984-85 Forecast	12 500.0	1 920	24 000.0
Barley for Grain[1]			
1981-82	5 475.8	2 506	13 724.2
1982-83	5 188.9	2 712	14 073.6
1983-84 Estimate	4 460.8	2 380	10 616.0
1984-85 Forecast	5 300.0	2 470	13 100.0
Corn for Grain			
1981-82	1 138.9	5 860	6 673.4
1982-83	1 107.1	5 883	6 512.9
1983-84 Estimate	1 076.9	5 455	5 874.8
1984-85 Forecast	1 170.0	5 700	6 650.0
Oats for Grain[1]			
1981-82	1 560.6	2 043	3 188.4
1982-83	1 633.2	2 256	3 683.9
1983-84 Estimate	1 400.3	1 980	2 773.1
1984-85 Forecast	1 600.0	2 000	3 200.0
Rye			
1981-82	445.4	2 082	927.2
1982-83	446.9	2 043	913.1
1983-84 Estimate	426.4	1 948	830.5
1984-85 Forecast	350.0	1 850	650.0
Rapeseed			
1981-82	1 401.5	1 319	1 849.0
1982-83	1 777.0	1 264	2 246.0
1983-84 Estimate	2 327.0	1 152	2 681.0
1984-85 Forecast	2 350.0	1 190	2 800.0
Flaxseed			
1981-82	465.5	1 005	468.0
1982-83	627.0	1 171	734.0
1983-84 Estimate	449.3	1 035	465.0
1984-85 Forecast	525.0	1 070	550.0
Soybeans			
1981-82	279.0	2 176	607.0
1982-83	364.0	2 354	857.0
1983-84 Estimate	364.0	1 981	721.0
1984-85 Forecast	380.0	2 220	850.0
Total[3]			
1981-82	23 738.5	-	53 698.3
1982-83	24 228.9	-	57 293.9
1983-84 Estimate[2]	24 712.9	-	52 037.9
1984-85 Forecast[2]	24 705.0	-	53 200.0

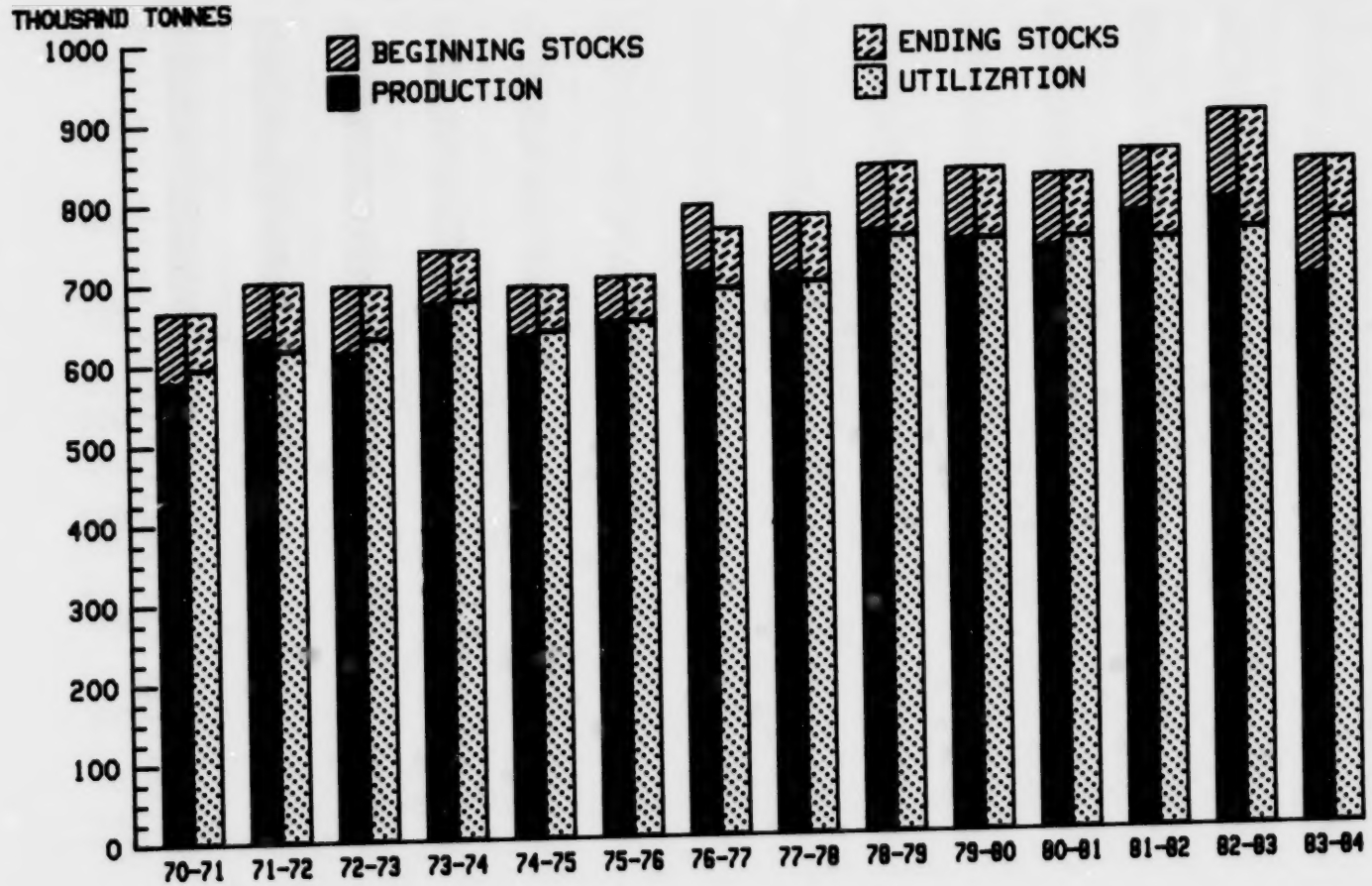
[1] Some oats and barley is cut for hay and green feed. The area reported above is that which is harvested for grain.
[2] The 1984-85 forecasts of areas are midpoints of a range. The production forecasts are based on normal yields and the area forecasts.
[3] Also includes mixed grains.

COARSE GRAIN SUPPLY AND DISAPPEARANCE, CANADA



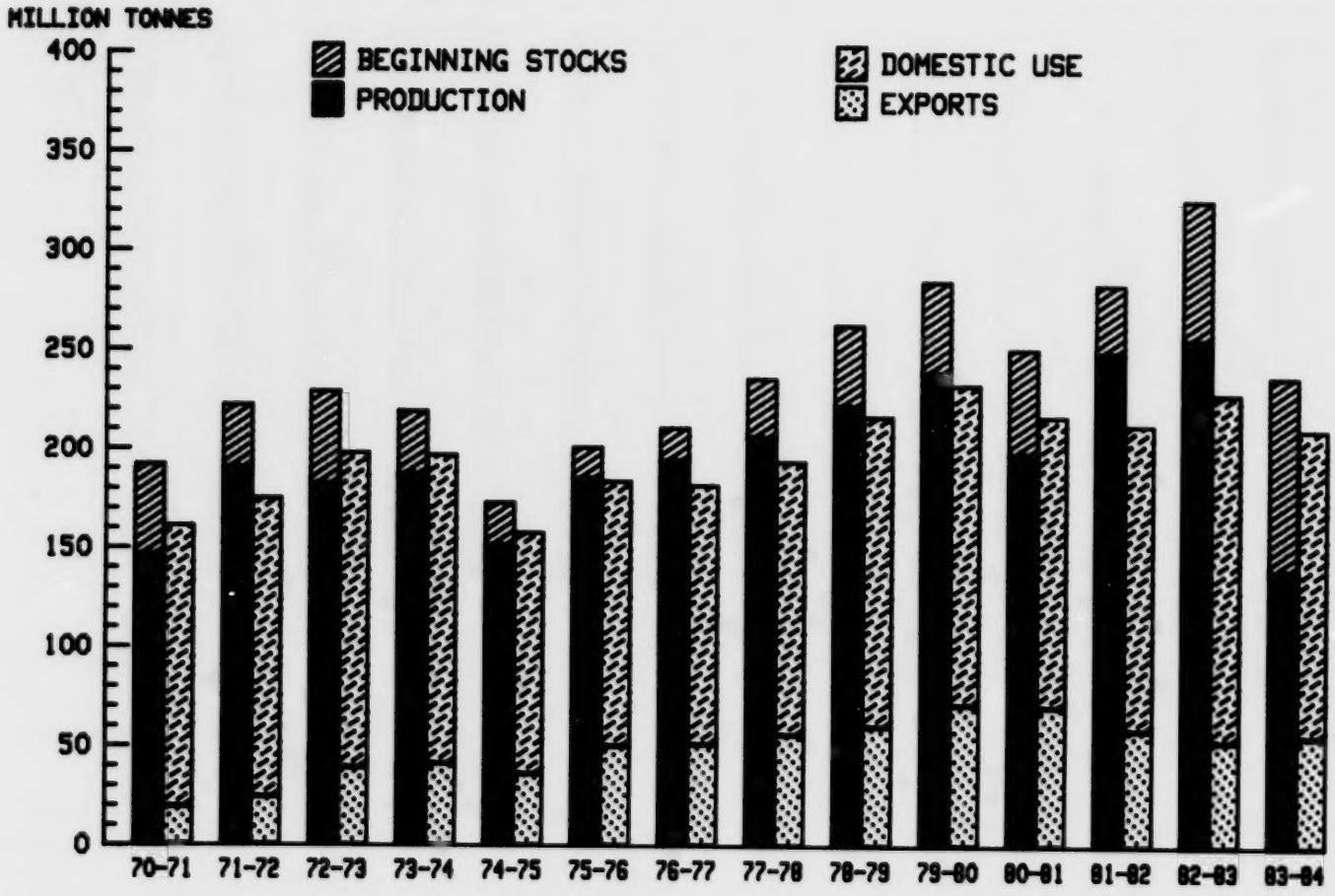
SOURCE: STATISTICS CANADA

COARSE GRAIN SUPPLY AND DISAPPEARANCE, WORLD



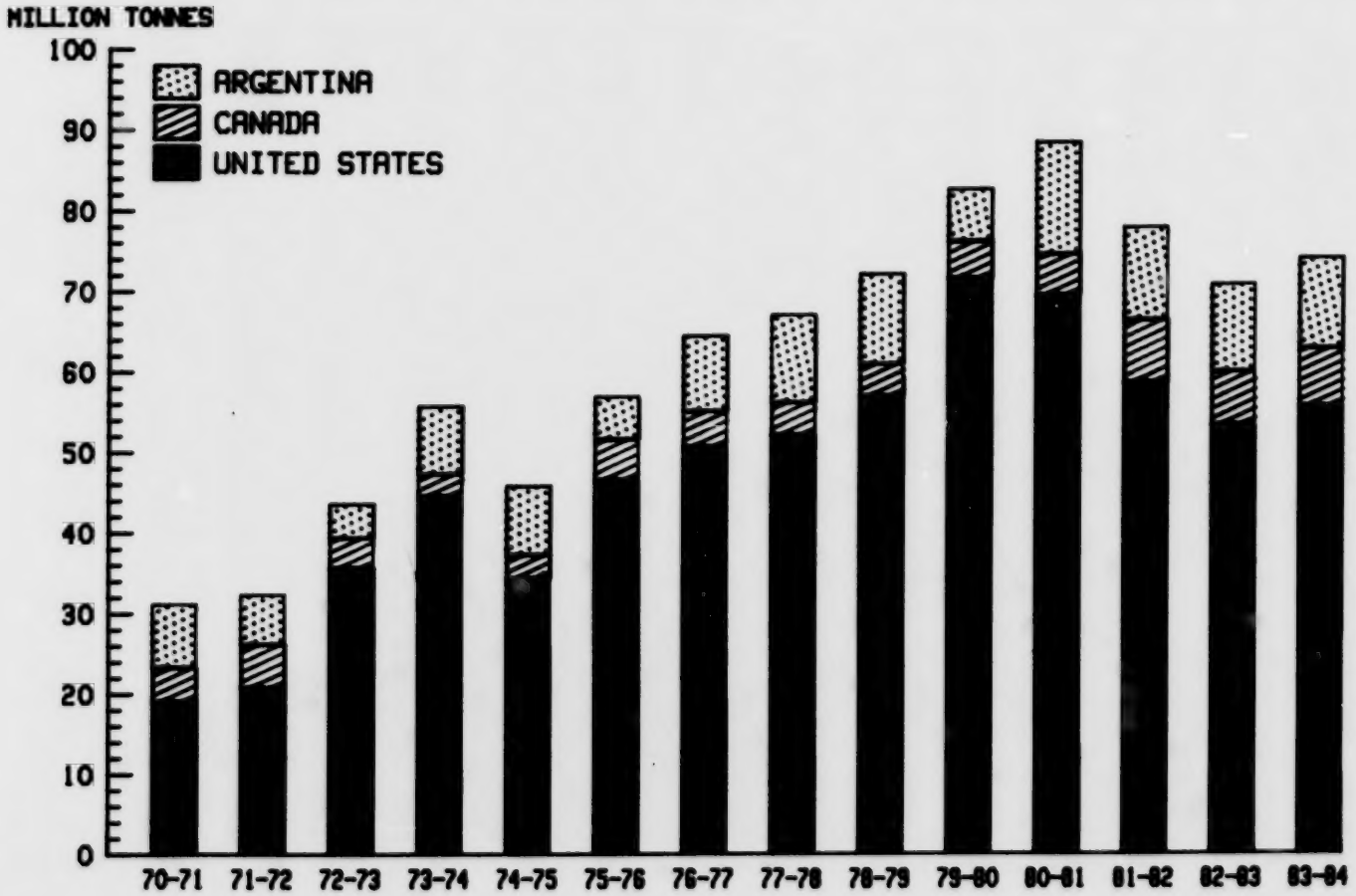
SOURCE: STATISTICS CANADA

COARSE GRAIN SUPPLY AND DISAPPEARANCE, UNITED STATES



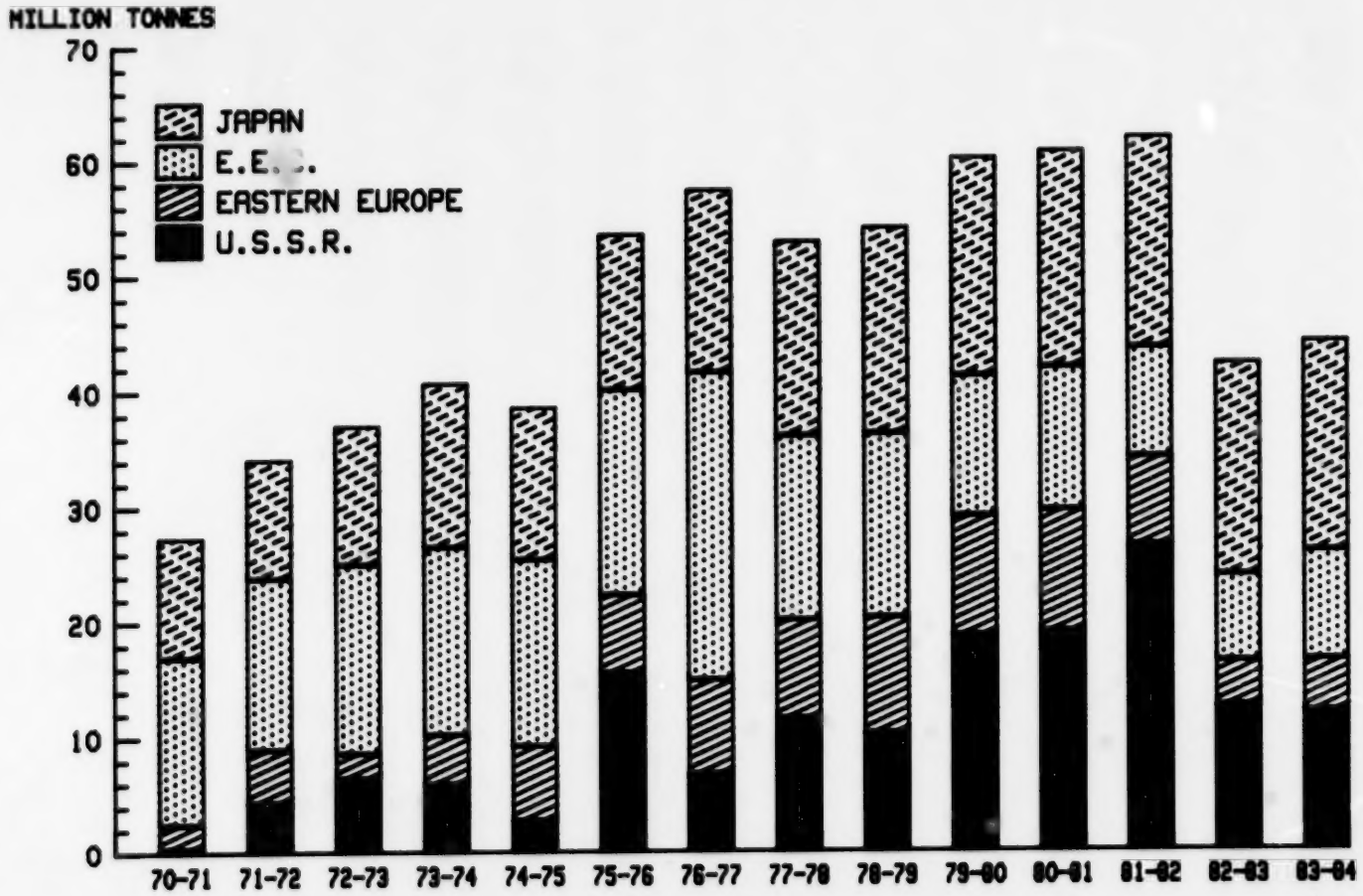
SOURCE: STATISTICS CANADA

COARSE GRAIN EXPORTS, CANADA, ARGENTINA AND UNITED STATES



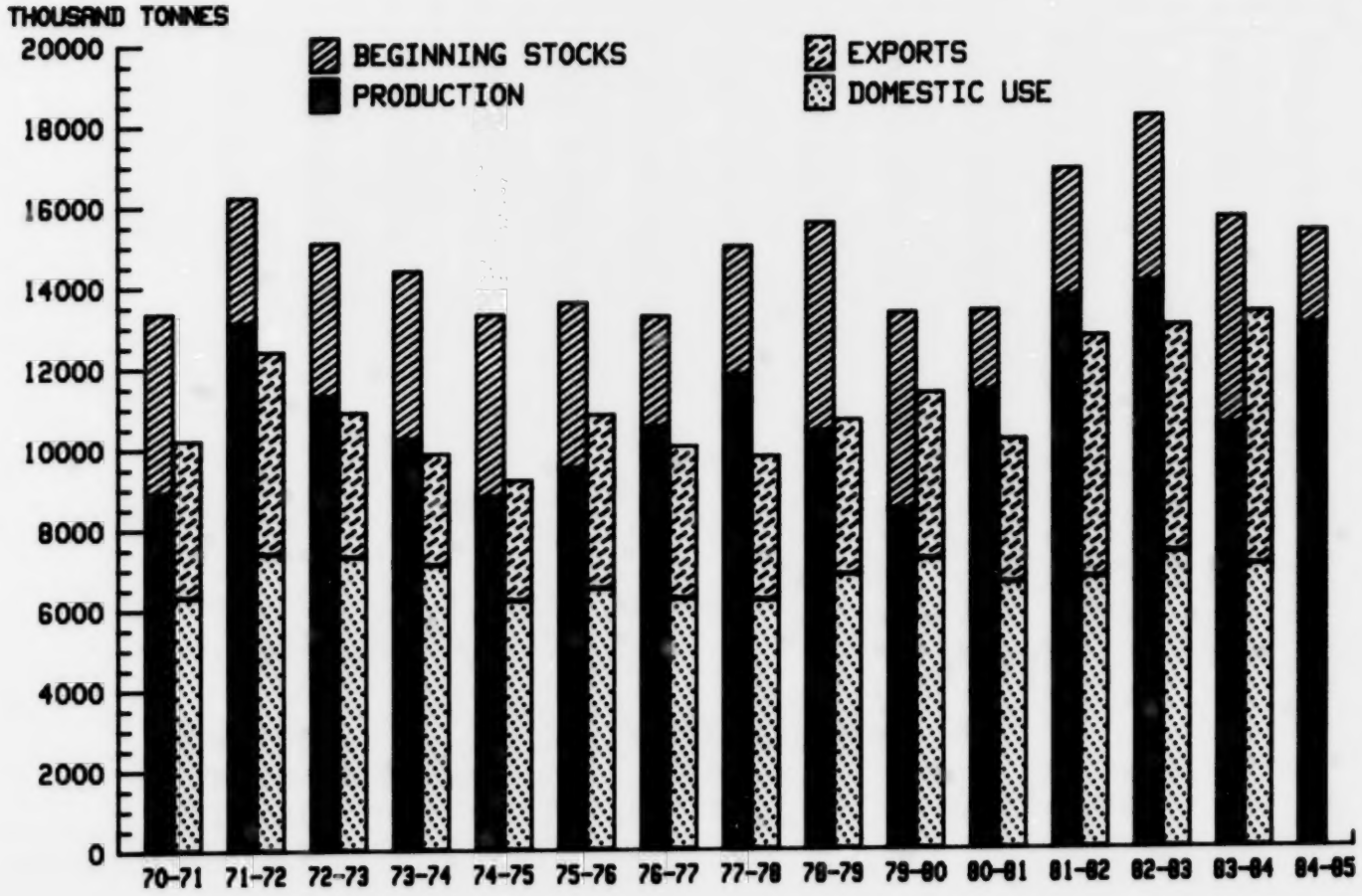
SOURCE: INTERNATIONAL WHEAT COUNCIL

COARSE GRAIN IMPORTS, USSR, JAPAN, EASTERN EUROPE AND E.E.C.



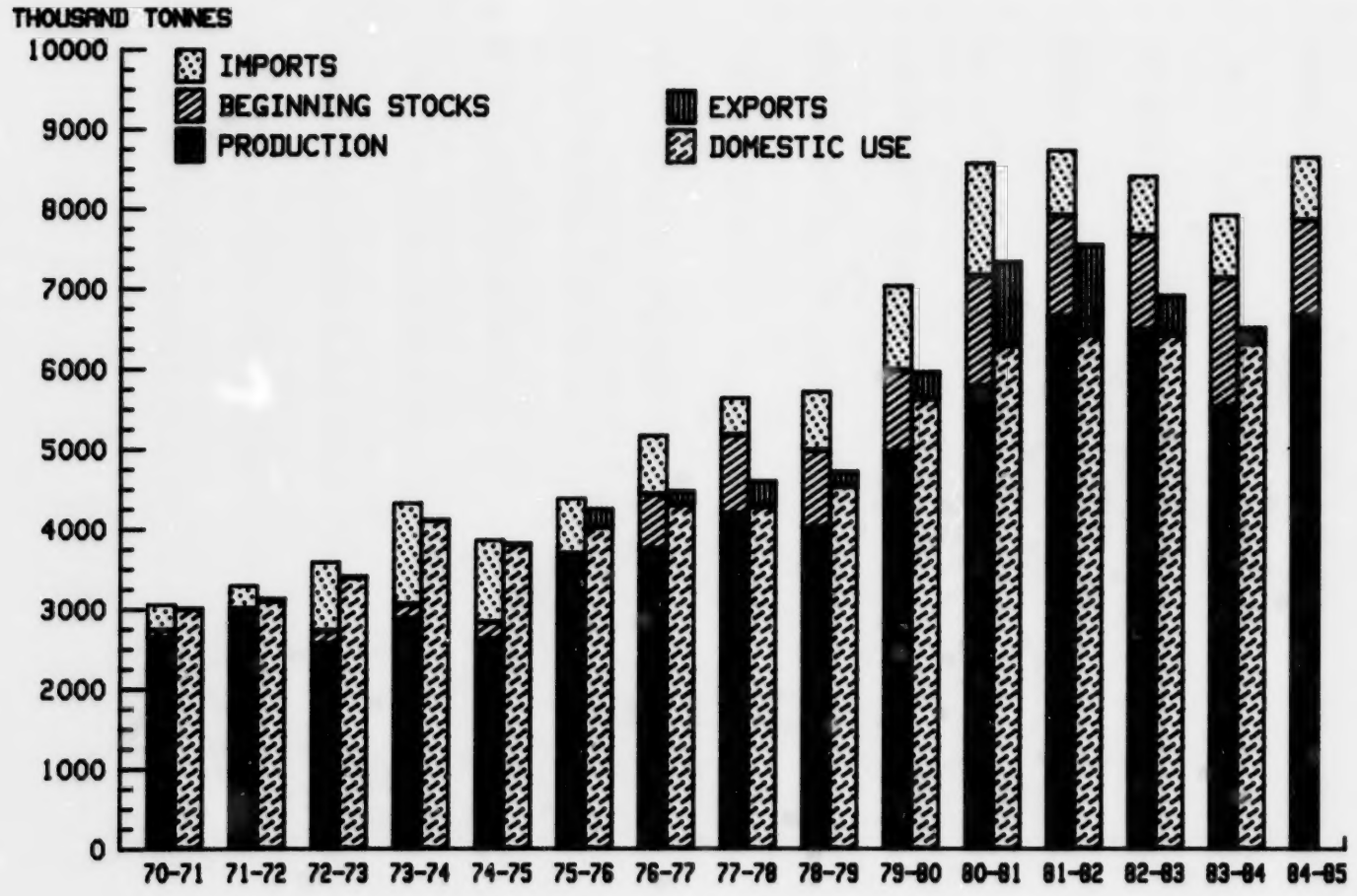
SOURCE: STATISTICS CANADA

BARLEY SUPPLY AND DISAPPEARANCE, CANADA



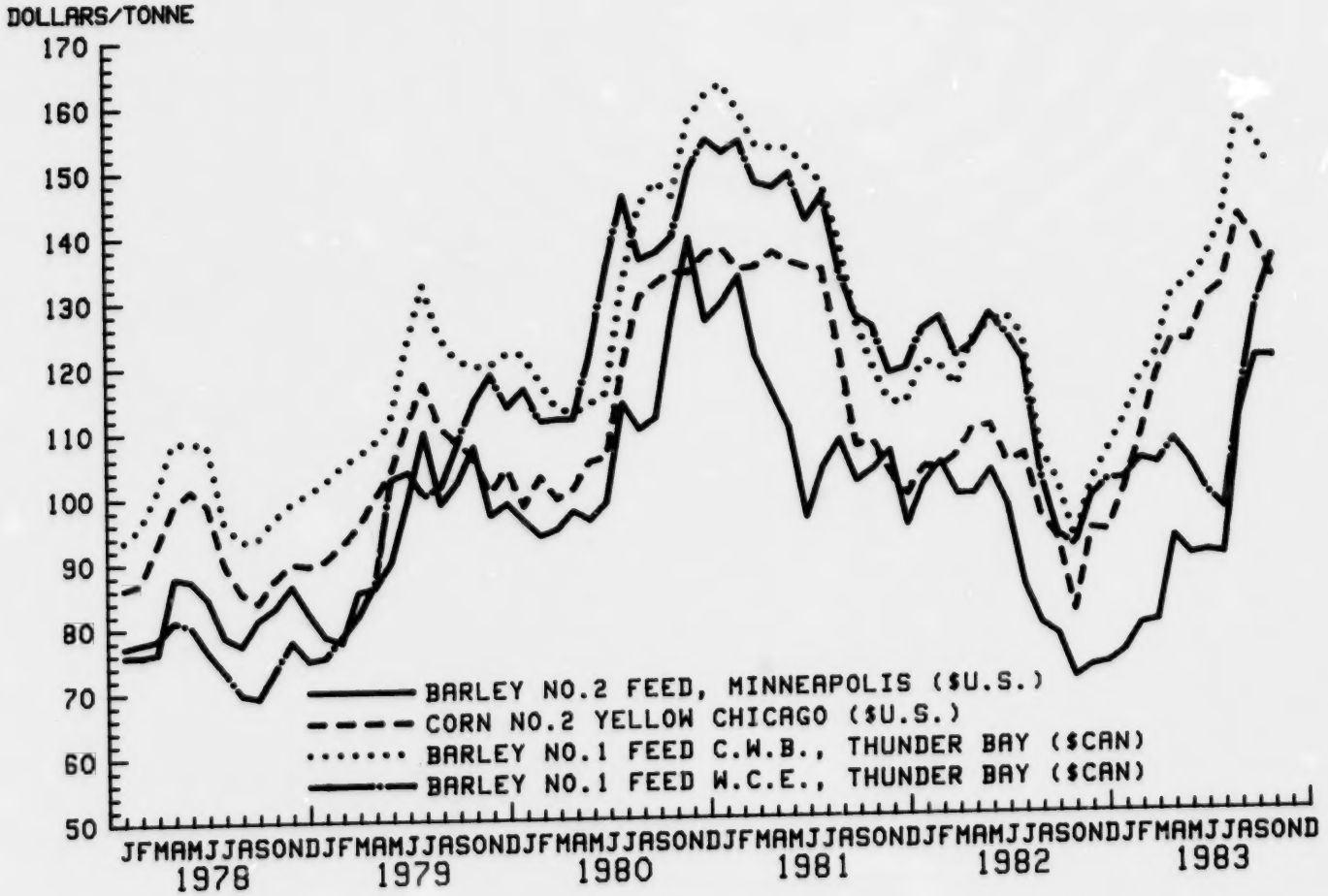
SOURCE: STATISTICS CANADA

CORN SUPPLY AND DISAPPEARANCE, CANADA

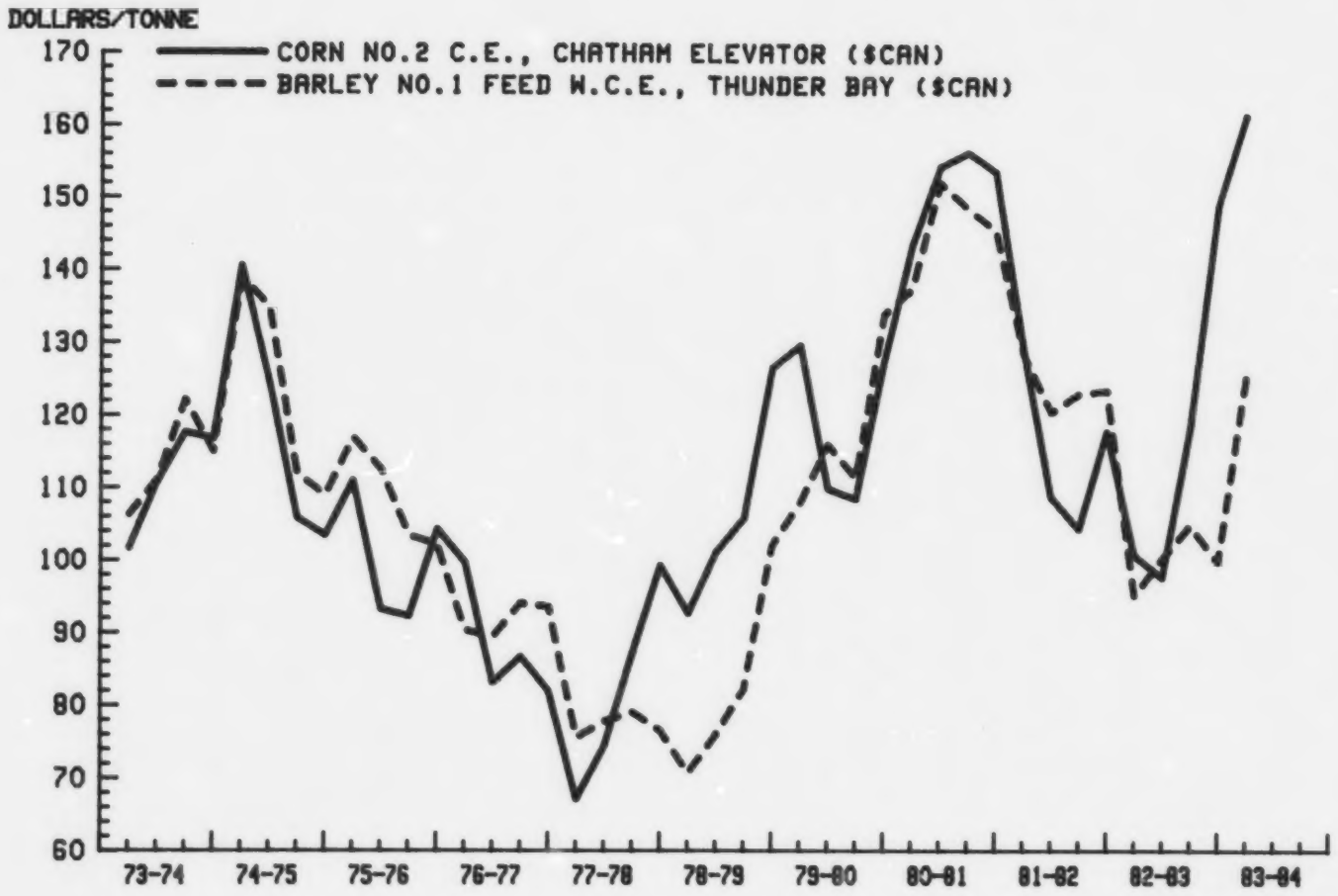


SOURCE: STATISTICS CANADA

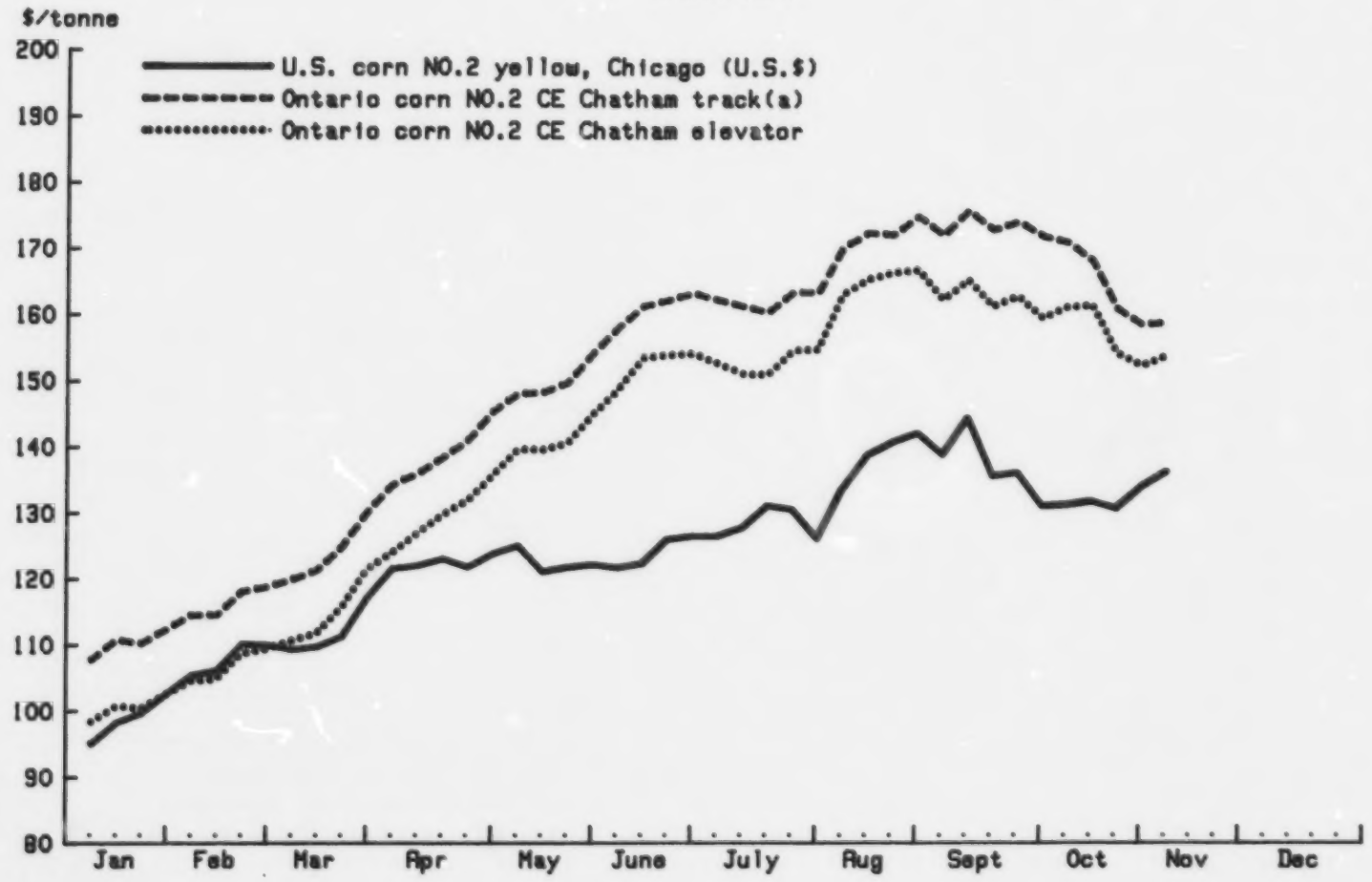
MONTHLY FEEDGRAIN PRICES, 1978 TO 1983



QUARTERLY FEEDGRAIN PRICES, 1973-74 TO 1983-84

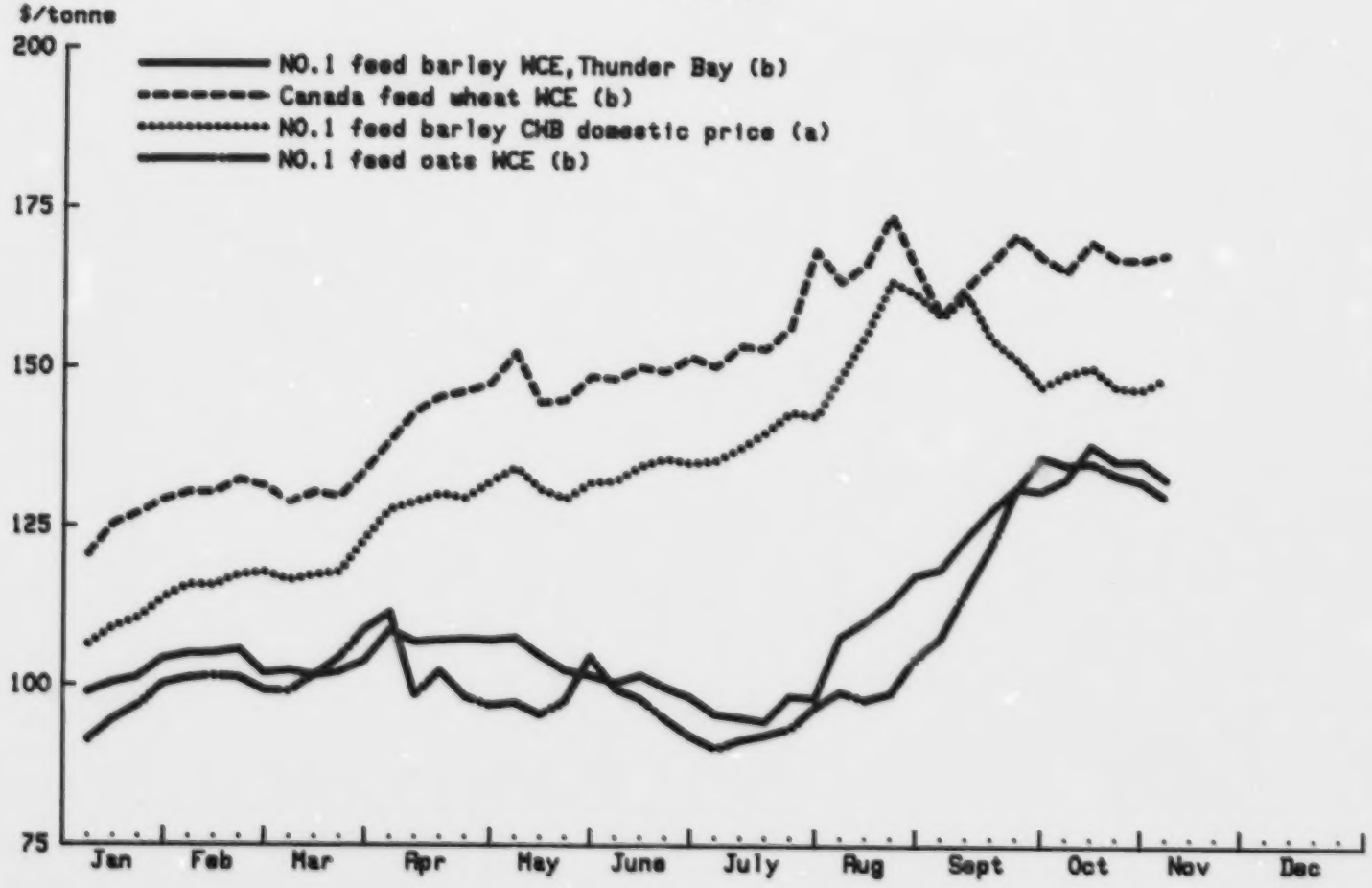


WEEKLY AVERAGE FEEDGRAIN PRICES: CORN
(1983)



(a) Based on mid-point of daily track price range

WEEKLY AVERAGE FEEDGRAIN PRICES: WHEAT, OATS AND BARLEY (1983)



(a) Canadian Wheat Boaard domestic quotationsé Thunder Bay
(b) Winnipeg Commodity Exchange cash quotations

OILSEEDS

H. Duncker

HIGHLIGHTS

The 1983-84 world production of oilseeds decreased about 9%, mainly due to a sharply reduced U.S. soybean crop. The reduction was a result of drought and, indirectly, of the PIK program which reduced acreage. Strong price increases in oilseeds and oilseed products occurred during July and August 1983, in particular for edible oils. Some price decrease occurred after August, partly in response to reduced demand. The 1983-84 world oilseed supplies are considered sufficient to meet requirements, and little price change is expected until 1984 at planting time in the northern hemisphere. The 1984-85 world oilseed production will probably increase and world oilseed prices are expected to decline in response.

Despite an increase of canola production in 1983, carryover stocks as of July 31, 1984 are expected to have dropped to very low levels due to an increase in both crushing and exports. While area seeded to canola is expected to increase slightly in 1984, no end to tightness in canola supply is forseen for 1984-85. In contrast, Canadian flaxseed supplies have remained large. However, Canadian flaxseed stocks will be drawn down as a result of significant export increase. Canadian 1984 soybean area will probably increase again.

WORLD

REVIEW - 1982-83

In 1982-83 supplies of edible oils and high protein meals (oil and meal equivalent) increased by about 6% after similar increases in 1981-82. The increases were mainly the result of increasing soybean and sunflower seed production in the United States. Production also increased elsewhere, particularly sunflower seed production in the USSR and Argentina and rapeseed in western Europe. Palm oil production in Malaysia increased strongly during the early months of 1982-83.

On the demand side, the recession, which started in early 1981 in the United States and which reduced real income per capita and consequently the demand for edible oils and meal, started to subside during the fall of 1982. However, recovery was slow. During 1983, demand for meat remained depressed in the developed countries. Therefore, because of relatively low meat prices, high protein meal could be profitably utilized only at low prices. The continuing high interest rates and the low prices for basic commodities affected the debt position of many developing countries and continued to depress their import demand for edible oils.

Because of continued supply pressure and weak demand at the start of the crop year, prices of oilseed products decreased to very low levels. However, from October 1982 onwards, prices of high protein meals started a slow increase, mainly because U.S. 1983 soybean acreage was expected to decrease as the indirect result of the PIK program, the implementation of which had already been anticipated in the fall of 1982. In turn, edible oil prices started to increase slowly in January 1983. In addition to the effects of the PIK program, this was the result of subsiding supply pressure for Malaysian palm oil. Slow price increase both of oils and meals generally continued until July 1983, notwithstanding soybean production increases in South America. The price of soybean meal (nearest futures) in the Chicago market, which was about U.S. $165.00/t in mid-October 1982, was about U.S. $190.00/t by early July 1983. The equivalent prices for oil were U.S. $370.00/t and U.S. $410.00/t respectively. Prolonged drought conditions in the soybean growing area of the United States dramatically pushed up prices during July.

SITUATION AND OUTLOOK - 1983-84

The PIK program reduced acreage and the drought reduced yields. U.S. 1983 soybean production decreased about 33%. Because of large carryin stocks, soybean supplies decreased 23%. U.S. sunflower seed crops and cotton seed crops also decreased. Oilseed production also declined elsewhere, particularly palm oil in western Malaysia. The growth of rapeseed production in western Europe virtually ceased. Overall, 1983-84 world oilseed production will probably decrease about 9%.

On the demand side, economic conditions continue to improve gradually, particularly in the United States. Prices of oilseed products continued to increase strongly through August. The price increase was particularly strong for edible oils (in contrast to the situation after the drought in 1980). At the end of August the soybean oil price was about U.S. $750.00/t and for meal U.S. $280.00/t.

The demand for edible oils tends to be more inelastic than for meal. In times of reduced supplies, this results in stronger price increase for oils. Because of its small impact on consumer budgets, price increases of edible oils do not much affect oil sales in the retail markets of the developed countries. In times of recession, as mentioned, the profitability of livestock feeding and, therefore, price increases for high protein meal tends to be limited. Presently this has been reinforced by relatively low prices and large availabilities of wheat as a possible alternative (both for feed grains and meal). Commercial demand for meal is therefore more price elastic and price increases have been more limited.

From August 1983 onward, contrary to expectations, prices of oilseed products have decreased. Price increase for oil and meal tended to outstrip soybean price increase during July and August. Consequently, on the one hand crushing margins and therefore soybean crushing and

output of oil and meal increased. On the other hand, utilization of oil and meal, because of increased prices, did not keep pace. In particular, the demand for edible oils from developing countries, many of which had good oilseed crops, decreased. More recently, U.S. soybean prices have been pushed downward by harvest pressure which tended to widen crushing margins again and therefore to increase crushing production and to further decrease the prices of oils and meals. Furthermore, there has been a tendency to profit from the high prices, particularly by debt-ridden-oilseed-producing developing countries. Prices are generally expected to decline during 1984-85.

During the remainder of the present crop year, world supplies of both oils and meals are not expected to increase significantly relative to last crop year. Soybean production in South America is expected to increase only about 8% if weather conditions remain favorable. Production of tropical oils is not expected to increase significantly.

World demand for oilseed products is expected to increase, albeit at a moderate rate since world economic recovery will probably be slow. Both interest and exchange rates of North American currencies will probably remain high. On the one hand, soybean crushing might decline due to reduced profitability arising from decreased oil and meal prices. This would, as a result, limit supplies of produced oils and meals. On the other hand, oil and meal utilization might further decrease. Prices of high protein meals and edible oils could remain firm at the present reduced levels. U.S. soybean supplies, though tight, would appear to be sufficient to meet requirements. At the end of October 1983, the prices for oil and meal had dropped to U.S. $635.00/t and U.S. $260.00/t respectively. Some further price decrease might occur during the spring of 1984 in anticipation of a probable increase in 1984 acreage and oilseed production.

FORECAST - 1984-85

Firm prices, low stocks, a return to double cropping of soybeans with wheat in the southern United States and a probable favorable soybean/corn price ratio at planting time in the spring of 1984 will increase oilseed production in North America. Oilseed production elsewhere should not increase significantly, in particular palm oil production in Malaysia. Malaysian palm oil yields are recovering only slowly.

On the demand side, world economic growth is expected to continue into the next crop year. As a result, a steady increase in demand for oilseed products is anticipated. Significant supply increases and more moderate demand increases could lead to some further price erosion during the fall of 1984. Prices will probably be lower during 1984-85 as compared to 1983-84.

CANADA

CANOLA-RAPESEED

Review - 1982-83

In 1982-83 canola-rapeseed production, though up 21%, continued to lag behind utilization as carryout stocks as of July 31, 1983 were reduced to very low levels. However, the supply situation was less tight than anticipated at the start of the crop year. The 1983 production was 200 000 tonnes higher than originally estimated. Therefore, in general export requirements could be met and crushings were nearly as high as in 1981-82. The large percentage of low grade canola-rapeseed, the result of a frost in August 1982, has apparently not been a serious impediment.

In 1982-83, exports were 1.27 Mt, about 7% below 1981-82, mainly because of decreased exports to Japan. Exports to western Europe, mainly to West Germany and the Netherlands, again increased slightly. The 1982-83 canola crushings were 900 000 t, only 4% below 1981-82, notwithstanding some idling of production capacity and low profit margins. However, crushing in Alberta was stimulated by a provincial subsidy. Canola rapeseed prices were relatively high at the start of the 1982-83 crop year because of canola supply tightness. However, in contrast to increasing soybean prices from October 1982 onward, they remained more or less unchanged throughout the crop year. The cash price of rapeseed in Vancouver which was about $290.00/t in October 1982 and about $300.00/t in early July 1983. In contrast to soybean prices, canola prices increased only moderately during July, to reach about $325.00 at the end of that month. However, canola prices increased strongly during August and the first half of September.

Situation and Outlook - 1983-84

Canadian 1983 canola-rapeseed area increased significantly, about 30%, to 2.33 million hectares, mainly due to the low stocks and relatively high prices at planting time. However, yields suffered from a late summer drought and, as a result, production only increased about 19%. Because of reduced carryin stocks, 1983-84 canola-rapeseed supplies increased only 8%.

During the first two months of the present crop year, canola-rapeseed exports declined due to tight supplies, but have been on the increase since September. In early November 1983, exports were about 5% above last year. In 1983-84 canola-rapeseed exports could increase 10% to 1.40 Mt. Reduced U.S. soybean availabilities, high soybean prices, and the high exchange rate of the U.S. dollar are expected to affect U.S. soybean exports to Japan to some extent. This could result in somewhat reduced Japanese soybean oil production and, consequently, in increased imports of canola seed. Exports to western Europe might continue to increase, and may also replace soybean crushing to some extent.

During August and September, crushings increased 32%. In line with world market prices, prices of canola-rapeseed products rose, canola oil in particular, and returned a measure of profitability to canola crushing. Total Canadian 1983-84 crushings are expected to increase 15% to about 1.05 Mt, although profitability might decline again and provincial subsidies have ceased. Canadian 1983-84 canola rapeseed utilization, including seed feed waste and dockage, could be about 2.75 Mt. This would imply 1983-84 carryout stocks of only about 400 000 t. The Vancouver rapeseed cash price, which was about $430.00 in mid-September 1983, declined to about $405.00/t by mid-November 1983. Canola prices are expected to decrease in line with world market prices in the spring of 1984.

Forecast - 1984-85

Tight 1983-84 supplies and relatively high canola prices at planting time in the spring of 1984 will probably cause 1984 canola plantings to increase marginally to about 2.35 million hectares. Quotas for canola deliveries will be high but rotation requirements and competition from barley will limit any increase in seeded area. This area, given average yields, should produce 2.8 Mt, compared to 2.7 Mt in 1983-84. In 1984-85 canola supplies should be 3.2 Mt, unchanged from the present crop year.

The expected increase in world oilseed production for 1984 will probably return supply pressure to world markets and decrease prices notwithstanding improving world economic conditions and increasing world demand for oilseed products. This would limit canola export increases in 1984-85. In line with world market prices, canola rapeseed prices could be further eroded during 1984-85. Reduced prices for oilseed products might again decrease profitability of crushing. In 1984-85 canola crushings may not increase. Therefore, for 1984-85, canola utilization should be 2.7 Mt, unchanged from levels to be attained during the present crop year. Even so, with expected 1984-85 supplies of 3.2 Mt no end to canola supply tightness is in sight.

FLAXSEED

Review - 1982-83

Canadian 1982 flaxseed production increased strongly by 55% to 735 000 t as a result of low stocks and relatively high prices. Supplies were close to 1 Mt compared to about 800 000 t in 1981-82. Since 1978, exports have been at relatively high levels because of significant demand for linseed oil from the USSR, and because of reduced export availabilities in Argentina and the United States. However, 1982-83 Canadian flaxseed exports declined marginally by about 4% to 429 000 t as a result of the recession and low prices of alternative oils such as soybean oil, in addition to increased seed and oil production and exports from Argentina and the United States. Carryover stocks as of July 31, 1983 had increased about 80% to

460 000 t. Flaxseed prices continued to fall, and only stabilized at low levels in the spring of 1983. The flaxseed cash price at Thunder Bay, which was about $310/t in August 1982, stood at approximately $290.00/t in mid-July 1983.

Situation and Outlook - 1983-84

Due to low flaxseed prices and the large supplies, area seeded to flaxseed in 1983 decreased 28% and production decreased 35% to about 465 000 t. However, because of large carryin stocks, 1983-84 supplies were still about 930 000 t, compared to 990 000 t in 1982-83. The flaxseed cash price rose in line with world market prices to about $410.00 by mid-September and declined to about $375.00 by the end of October 1983.

Flaxseed exports have increased significantly. On November 16 Canadian flaxseed exports were 205 900 t, 35% above last year. This has mainly been due to the following factors: in spite of spectacular price increases during August and the first half of September 1983, linseed oil prices were still 26% below soybean oil prices in northwestern European markets as of November 10, 1983. In addition, 1983 flaxseed production has decreased in the United States and will decrease in Argentina, thus reducing competition in export markets. Furthermore, economic conditions have improved slowly in the western industrialized world.

Economic conditions are expected to continue to improve and the price discount of linseed oil relative to alternatives may remain in effect until spring 1984. Exports are expected to continue to climb. Total Canadian 1983-84 supplies will be sufficient to meet requirements but carryover stocks will be reduced to about 250 000 t. High utilization and relatively high prices will probably increase Canadian 1984 flaxseed plantings. However, flaxseed prices are expected to decrease in line with world market prices of oilseeds towards the end of the present crop year. Alternatives to linseed oil might again become more competitive. Canadian 1984-85 flaxseed utilization may decrease slightly.

SOYBEANS

Review - 1982-83

Canadian 1982-83 soybean production increased 40% to about 860 000 t. This was mainly due to a 30% increase in seeded area which, in turn, was a result of winterkill in the wheat growing areas of southern Ontario and the spread of soybean cultivation outside the traditional area in southern Ontario.

In 1982-83 soybean exports increased by 30% to close to 120 000 t, mainly because of significant shipments to the Netherlands. However, soybean imports also increased by about 13% to 420 000 t.

Domestic soybean crushings increased by about 8% to 1 050 000 t. Canada is increasingly a net exporter of soybean oil. Net imports of soybean meal remained approximately unchanged at about 370 000 t. In line with world market prices for oilseeds, the Canadian soybean price (No. 2 and better soybean track Chatham) increased from a low of about $220 in October 1982 to about $280 in July 1983. It reached $395 by the end of August 1983.

Situation and Outlook - 1983-84

Despite the same seeded area of 364 000 hectares, 1983 soybean production decreased 16% to about 720 000 t as a result of drought. Limited availabilities in Canada and the United States could cause both soybean imports and exports to decline.

In line with world market prices, Canadian soybean prices are expected to remain firm until the spring of 1984, after which slow price erosion may occur.

The area seeded to soybean in 1984 might increase again as a result of a soybean-corn price ratio which will probably favor soybean growing and because of the continuing spread of soybean growing outside the 5 southern-most counties. Canadian 1984 soybean area should increase to about 380 000 hectares.

SUNFLOWER SEED

In 1982 production of Canadian sunflower seed decreased 43% to 95 000 t, mainly because of depressed prices and difficult disease control 40 000 t were exported, mainly to the United States.

The area seeded to sunflower seed in 1983 has declined sharply because of low prices at planting time and problems of disease control. Production declined to 51 000 t. Though contracts decreased again, most of the 1983 crop will be crushed domestically.

TABLE 5. ESTIMATED SUPPLIES AND UTILIZATION OF OILSEEDS IN SELECTED COUNTRIES (Mt)

	Major exporters			Major importers		
	1981-82	1982-83 Estimate	1983-84 Forecast	1981-82	1982-83 Estimate	1983-84 Forecast
	United States			EEC		
		Soybeans			Soybeans	
Beginning stocks	8.7	7.2	10.5	-	-	-
Production	54.4	60.7	41.8	-	-	-
Imports	-	-	-	12.3	10.8	
Total supply	63.1	67.9	52.3	12.3	10.8	
Exports of seed	25.3	24.6	19.6	2.0	1.1	
Domestic crushings	28.0	30.2	26.5	11.7	10.2	
Ending stocks	7.2	10.5	3.8	-	-	
Net exports oil	+ 0.9	+ 0.9	+ 0.6	+ 0.4	+ 0.5	
Net exports meal	+ 6.3	+ 6.5	+ 5.1	- 7.0	- 7.0	
		Flaxseed			Rapeseed	
Beginning stocks	0.07	0.05		-	-	-
Production	0.20	0.30	0.19	2.00	2.64	2.47
Imports	0.08	0.05		-	-	
Total supply	0.35	0.40				
Exports of seed	0.01	0.01				
Domestic crushings				1.74	1.99	
Ending stocks	0.5					
Net exports oil	+ 0.03	+ 0.02				
Net exports meal	+ 0.12	+ 0.08				
		Sunflower			Flaxseed	
Beginning stocks	0.3	0.1				
Production	2.1	2.5	1.5	0.04	0.04	
Imports	-	-	-	0.30	0.20	
Total supply	2.4	3.1				
Exports of seed	2.4	3.1				
Domestic crushings	1.7	1.7		0.04	0.04	
Ending stocks	0.1	0.3				
Net exports oil	+ 0.2	+ 0.3		-	+ 0.02	
Net exports meal	-	-		- 0.50	- 0.44	

(continued)

TABLE 5. (Continued)

	Major exporters			Major importers		
	1981-82	1982-83 Estimate	1983-84 Forecast	1981-82	1982-83 Estimate	1983-84 Forecast
	Brazil			Japan		
	Soybeans			Soybeans		
Beginning stocks	4.6	4.4	4.4	-	-	-
Production	12.8	14.8	15.3	-	-	-
Imports	1.1	1.2		4.3	4.6	
Total supply	18.5	20.4		4.3	4.6	
Exports of seed	0.7	0.5		-	-	
Domestic crushings	12.4	13.1		3.6	3.9	
Ending stocks	4.4	4.4		-	-	
Net exports oil	+ 0.9	+ 0.9		-	-	
Net exports meal	+ 8.1	+ 814		- 0.1	- 0.2	
	Argentina			Japan		
	Soybeans			Rapeseed		
Beginning stocks	0.5	0.9	1.0	0.7	0.06	
Production	4.1	3.6	4.7	-	-	
Imports	-	-	-	1.18	1.23	
Total supply	4.6	4.4	5.7	1.25	1.29	
Exports of seeds	2.0	1.1		-	-	
Domestic crushings	1.5	2.1		1.20	1.22	
Ending stocks	0.9	1.0		0.06	0.07	
Net exports oil	+ 0.15	+ 0.27				
Net exports meal	+ 0.8	+ 1.30				
	Argentina			USSR		
	Sunflower			Soybeans		
Beginning stocks	0.05	0.11		-	-	-
Production	1.81	2.20	2.50	0.45	0.46	0.59
Imports	-	-		2.1	2.2	
Total supply	1.86	2.31		2.55	2.66	
Exports of seed	0.01	0.02		-	-	
Domestic crushings	1.55	2.08		1.8	1.9	
Ending stocks	0.11					
Net exports oil	+ 0.33	+ 0.51		- 0.20	- 0.18	
Net exports meal	+ 0.52	+ 0.83		- 1.20	- 1.50	

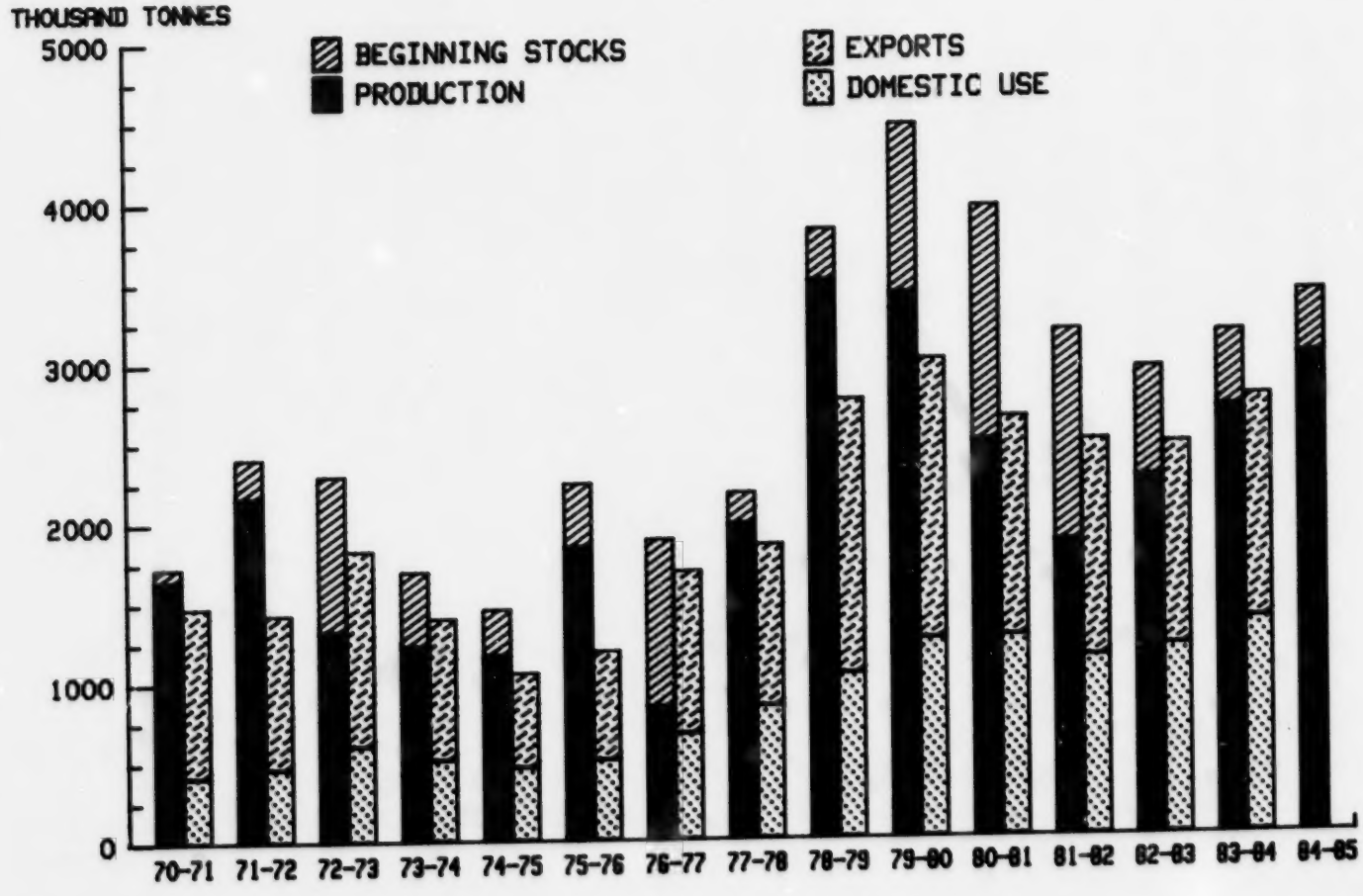
(continued)

TABLE 5. (Concluded)

	Major exporters			Major importers		
	1981-82	1982-83 Estimate	1983-84 Forecast	1981-82	1982-83 Estimate	1983-84 Forecast
		Argentina				
		Flaxseed				
Beginning stocks	0.01	0.04				
Production	0.60	0.78	0.65			
Imports						
Total supply						
Exports of seed	-	-				
Domestic crushings	0.58	0.55	+ 16%			
Ending stocks	0.04					
Net exports oil	+ 0.18	+ 0.18				
Net exports meal	+ 0.36	+ 0.32				
		Malaysia				
		Palm oil*				
Beginning stocks	0.34	0.40				
Production	3.3	3.5				
Total supply	3.6	3.9				
Ending stocks	0.40	0.43				
Net exports oil	+ 2.8	+ 3.0				
		Philippines				
		Coconut oil*				
Beginning stocks	0.12	0.15				
Production	1.35	1.40				
Total supply	1.47	1.55				
Ending stocks	0.15					
Net exports oil	+ 0.97	+ 1.02				

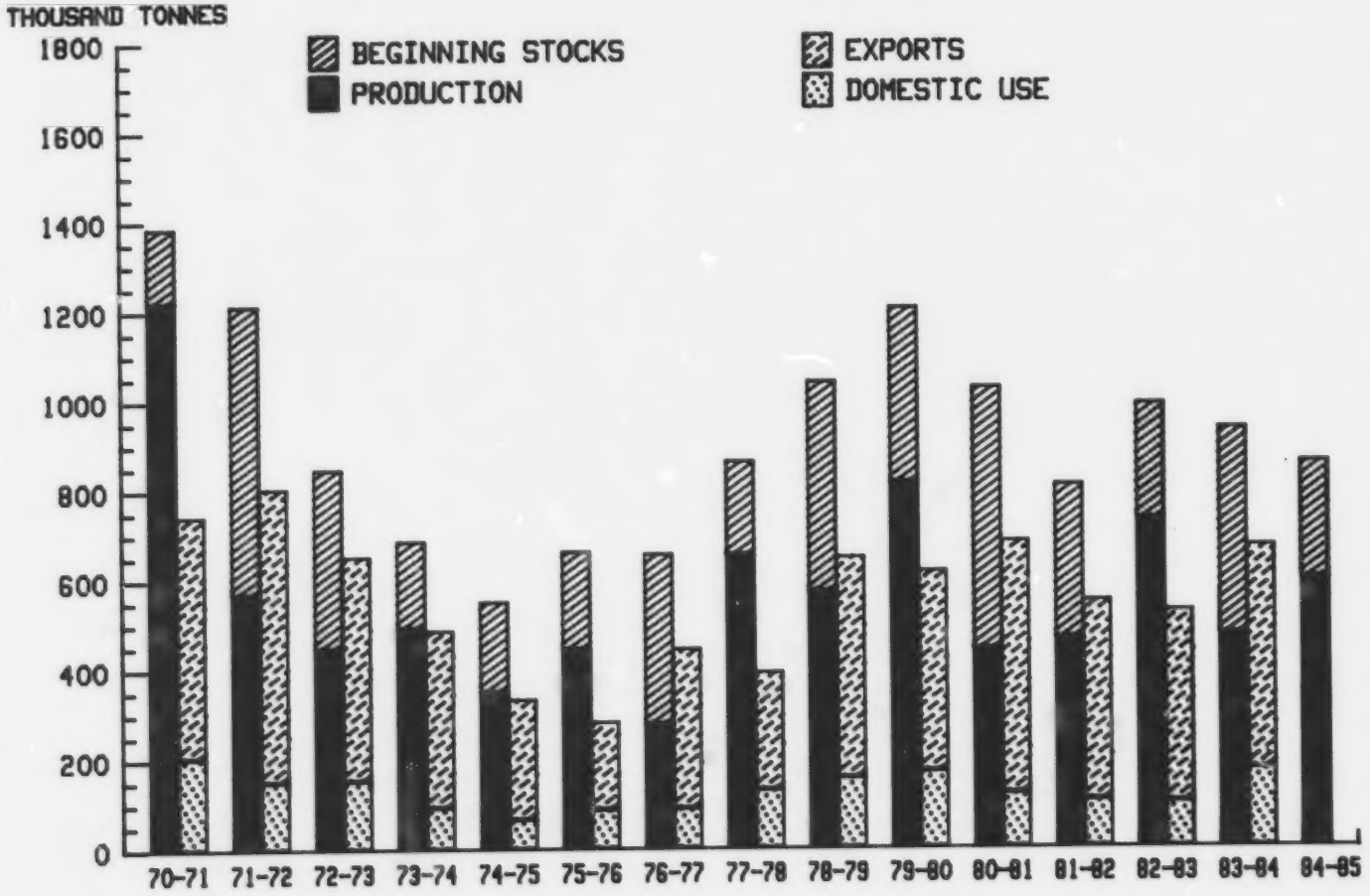
*Calendar Year

RAPESEED SUPPLY AND DISAPPEARANCE, CANADA



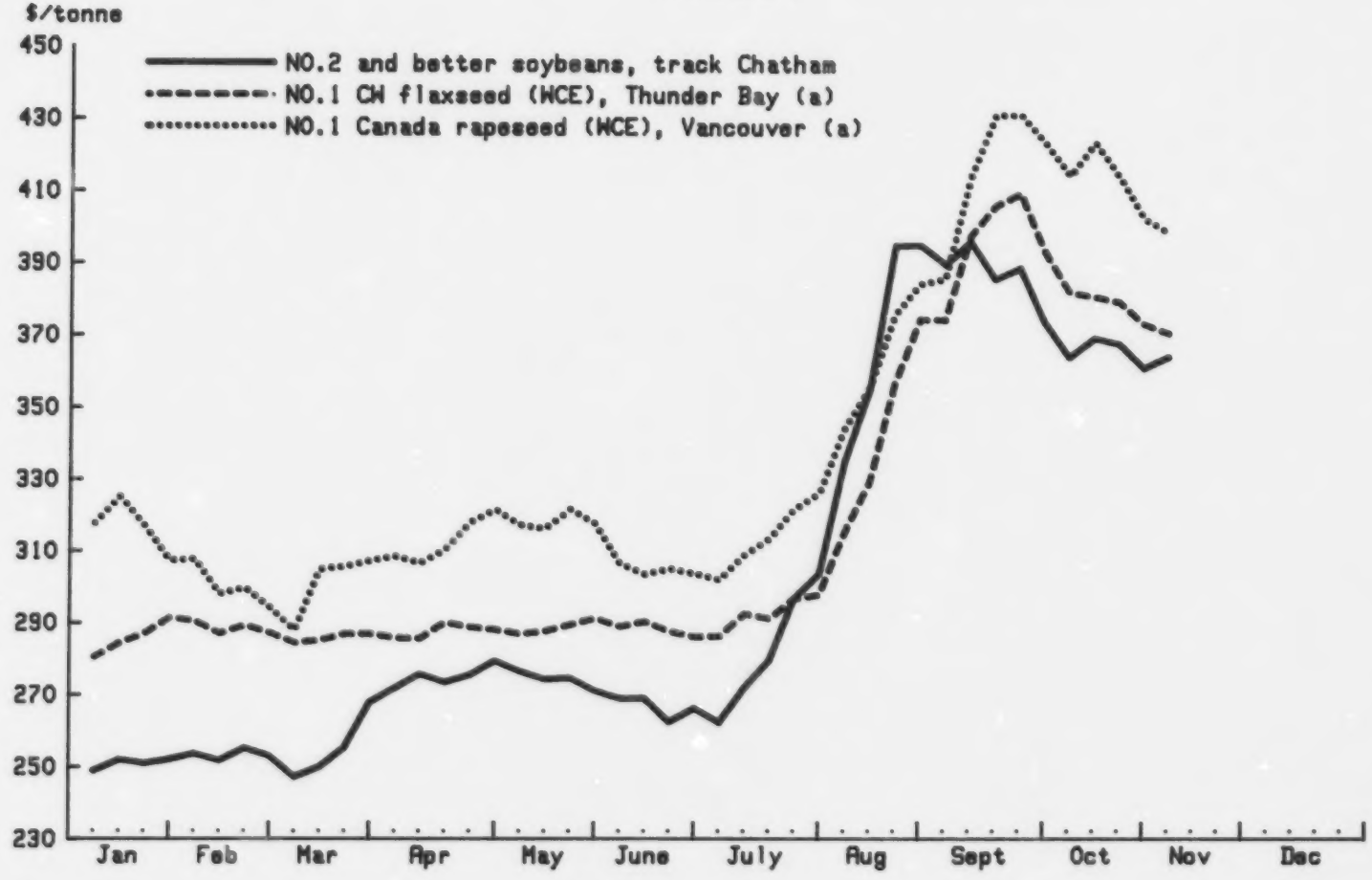
SOURCE: STATISTICS CANADA

FLAXSEED SUPPLY AND DISAPPEARANCE, CANADA

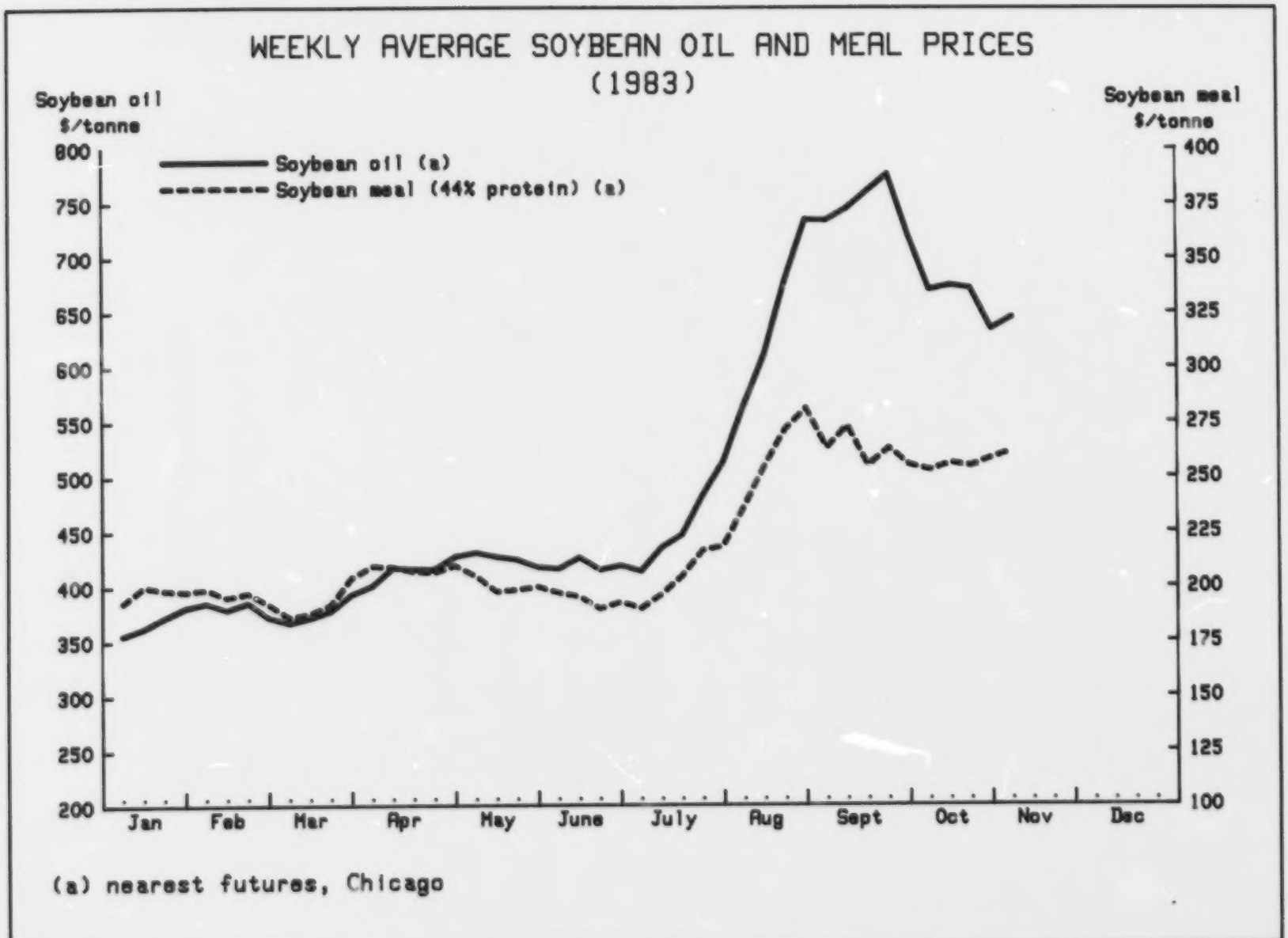


SOURCE: STATISTICS CANADA

WEEKLY AVERAGE OILSEED PRICES
(1983)



(a) Winnipeg Commodity Exchange Cash Quotations


WEEKLY AVERAGE SOYBEAN OIL AND MEAL PRICES
(1983)
Soybean oil
$/tonne
Soybean meal
$/tonne
Soybean oil (a)
Soybean meal (44% protein) (a)
800
750
700
650
600
550
500
450
400
350
300
250
200
400
375
350
325
300
275
250
225
200
175
150
125
100
Jan
Feb
Mar
Apr
May
June
July
Aug
Sept
Oct
Nov
Dec
(a) nearest futures, Chicago

APPENDIX: INCENTIVES FOR PARTICIPATION IN 1984 U.S. WHEAT AND FEED GRAIN PROGRAMS

Brian Paddock

INTRODUCTION

In response to record supplies of wheat, feed grains and soybeans in 1982-83, the U.S. Government instituted a program designed to reduce 1983 production by cutting acreages. The program was successful in idling 32.1 million acres of land from the wheat acreage base and 40 million acres from the feed grain base. Increased yields and higher beginning stocks have offset the wheat acreage reduction, and 1983-84 U.S. supplies are virtually the same as in the previous year. However, drought reduced yields and reduced acreage lowered U.S. feed grain supplies by about 80 million tonnes. Therefore, in August 1984, the United States Department of Agriculture (USDA) announced a similar program for wheat for the 1984-85 crop year. A program for corn was subsequently announced. The objective of this paper is to compare the incentives to participate in the 1984 programs with those for the 1983 programs and thereby gain some insight into the prospects for U.S. wheat and corn acreage in 1984.[1]

THE 1983 AND 1984 PROGRAMS

In 1983-84 U.S. wheat and feed grain programs were divided into two parts. The first part, announced in the fall of 1982, was known as the Reduced Acreage Program (RAP). To participate in a program, farmers were required to divert to conservation purposes 20% of their acreage base for that crop. For wheat this 20% included a 15% (of the acreage base) unpaid diversion and a 5% diversion for which producers would be paid. For feed grains, the 20% Reduced Acreage Program consisted of a 10% paid diversion and a 10% unpaid diversion. Participation in these programs entitled the producers to receive deficiency payments if the average farm price fell below the target price and to place grain under Commodity Credit Corporation (CCC) loans.

Late in 1982 it was recognized that these measures would not adequately control production. As a result, in January 1983 a Payment in Kind (PIK) program was announced whereby producers could divert an additional 10%-30% of their acreage base. In return producers would receive, from either the CCC or the Farmer Owned-Reserve stocks, grain equal to a percentage of the producer's program yield for each acre entered into this program. The payback rate was 95% for wheat and 80%

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[1] For readers unfamiliar with the basic structure of U.S. crop programs, a brief summary is provided in Appendix A.

The author gratefully acknowledges helpful comments provided by Dr. B. Oleson, M. Liu and Harvey Brooks of the Canadian Wheat Board.

for feed grains. As a final option producers could enter a bid for the payback rate at which they would be willing to retire all of their acreage not idled under the RAP or 30% PIK programs. Acceptance of the Whole-Base Bid was at the discretion of the USDA.

The program for 1984 is similar to 1983 in that it can be divided into a Reduced Acreage Program, participation in which is required for deficiency payments and access to CCC loans, and a PIK option. However, most of the details of the programs are different. The essential features of the two programs are contained in Table 1. The main differences are:

TABLE 1: COMPARISON OF 1983-84 AND 1984-85 U.S. CROP PROGRAMS

	1983	1984
WHEAT		
Reduced Acreage Programs		
Unpaid	15%	30%
Paid	5%	-
Diversion payment[1]	$2.70/bushel	-
PIK Program		
Standard	10-30%	10-20%
Whole-base	Yes	No
Payback rate	95%	75%
Target price	$4.30/bushel	$4.45/bushel
Loan rate	$3.65/bushel	$3.30/bushel
CORN		
Reduced Acreage Programs		
Unpaid	10%	10%
Paid	10%	-
Diversion payment[1]	1.50/bushel	-
PIK Program		
Standard	10-30%	-
Whole-base	Yes	-
Payback rate	80%	-
Target price	$2.86/bushel	$3.03/bushel
Loan rate	$2.65/bushel	$2.55/bushel

[1]paid based on participant's program yield on the paid portion of producer's acreage reduction

(1) The paid diversions for both wheat and corn have been eliminated

(2) The PIK payback rate for wheat has been reduced from 95 to 75%

(3) There will be no PIK program for corn

(4) There will be no whole base bid option

(5) The target price for wheat has been increased from $4.30 to $4.45/bushel while the loan rate has been reduced from $3.65 to $3.30/bushel.

(6) The target price for corn has been increased from $2.86 to 3.03/bushel while the loan rate has been reduced from $2.65 to $2.55/bushel.

With respect to item (2) above, the rationale for the change is that because the 1984-85 PIK program was announced before the winter wheat crop was planted, producers will not have committed planting cost before deciding whether to participate in the PIK program.

METHOD OF ANALYSIS

To analyse the attractiveness of the 1984 programs three budgets[2] are constructed for each year - one each for a non-participant, a participant in the RAP only and a participant in both the RAP and the PIK program at the 30% level. The budgets were used to estimate net revenue per acre for each of the three levels of participation for a range of prices. Using this data, the market prices were determined at which the producer would maximize his net returns by changing his level of participation. These prices were then compared to the prices which, at the time producers made their participation decision, were expected to prevail in the respective crop year.

In order to provide a basis for comparison, the same procedure was repeated for the 1983 programs.

To facilitate this analysis, estimates of production costs are required. The levels of costs assumed for the analysis were drawn from analyses done by Chase Econometrics and are summarized in Table 2. Worthy of note is the higher cost of land placed under PIK in 1983-84 than in 1984-85. This is because in 1983 to place land into the PIK program producers would have had to divert land already planted.

Because producers tend to idle their poorest quality land, participants' yields tend to be higher than those of non-participants. For this analysis it is assumed that a producer can expect his average yield to rise by 1 bushel/acre for each 10% of his land idled.

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[2] A sample of the budget used for the analysis is contained in Appendix B.

TABLE 2: COST ASSUMPTIONS FOR NET REVENUE ANALYSIS

	1983	1984
	($/acre)	
Wheat		
Total variable costs	65	65
PIK costs	40	20
Conservation costs	20	20
Corn		
Total variable costs	159	159
Conservation costs	20	20

ANALYTICAL RESULTS FOR WHEAT PROGRAMS

The results of the comparative analysis of the three options for wheat producers for 1983 and 1984 are illustrated in Figures 1 and 2. Before comparing the programs in each of these years, it is interesting to look at the pattern of net returns to producers at the three levels of participation[3] as the market price rises. First of all, for the non-participant, net revenue increases in a linear fashion as the market price increases. For the producer participating only in the RAP program however, net revenue is constant as the market price increases until the market price surpasses the loan rate. This is because the deficiency payment cannot exceed the difference between the target price and the loan rate. Moreover, it is assumed that if the market price is less than the loan rate the producer will place his grain under a non-recourse loan with the CCC. Therefore even though the market price rises, the producer's revenue from the market and from deficiency payments is constant until the market price reaches the loan rate. The net revenue for the RAP/PIK participant will rise as market price rises, even if the market price is below the loan rate. This is because PIK payments cannot be placed under CCC loans; their value therefore increases whenever the market price increases.

In assessing the incentives for program participation in the 1984 program it is useful to compare the break-even points for program participation with those for participation in 1983.

As can be seen in Figures 1 and 2, at very high prices, non-participation provides the highest net returns. At very low prices, participation in the RAP only is most profitable, while for a range of prices in between, participation in both the RAP and the PIK option is most profitable. Figure 1 reveals that for prices below $4.30/bushel,

[3]Estimates of net revenue/acre at various market prices are also presented in tabular form in Appendix C.

but above $3.60/bushel, participation in the 1983 RAP/PIK program was a producer's most profitable option. Expectations were that market prices for that year would be about $3.80/bushel.[4] Thus, the RAP/PIK program was a very attractive option.

The 1983 wheat program was particularly attractive to producers of spring wheat. Unlike producers of winter wheat, they did not have to idle land on which expenditures for inputs had already been made in order to place acreage into the PIK program. Their cost savings from PIK participation would therefore be $45/acre rather than the $25/acre estimated for winter wheat producers. To obtain a crude estimate of the added attractiveness of the program for spring wheat producers, the breakeven prices between non-participation and RAP/PIK participation and between RAP and RAP/PIK participation were calculated under the assumption that PIK costs were $20/acre (the same as normal conservation costs) rather than $40/acre. Given these assumptions RAP/PIK participation was the most profitable option for prices as low as $3.20/bushel and as high as $5.10/bushel. Thus the reduced costs made PIK participation very attractive to producers of spring wheat regardless of whether they had high or low price expectations.

Figure 2 reveals RAP/PIK participation is less attractive in 1984-85 than for 1983-84. In particular, at no price level does participation in the PIK option maximize returns. The break-even price for participation on the RAP for 1984-85 is estimated to be $3.80/bushel compared with $4.10/bushel for RAP participation and $4.30 for RAP/PIK participation in 1983-84. This leaves producers' expectations of 1984-85 prices as the critical variable. Current expectations are that the season average farm price will be about $3.66/bushel.[5] At this price RAP participation would be the most profitable option, although the margin over non-participation is reduced from 1983-84.

ALTERNATIVE SCENARIOS

Lower yield prospects

Since wheat production in the United States is geographically widely distributed, levels of costs and yield prospects in particular will vary according to local weather conditions. Since certain areas of the United States are currently experiencing dry weather conditions, a second set of calculations was made for 1984-85 assuming expected yields of 5 bushels/acre below normal. The results of this analysis are illustrated in Figure 3. The result of lowering expected yields is to increase the attractiveness of both the RAP/PIK and the RAP programs. Prices can rise as high as $4.10/bushel before non-participation becomes the most profitable alternative. This is because deficiency payments are based on the producer's program yield,

[4]See for example the Chase Econometrics prediction in October 1982 of $3.85/bushel

[5]Chase Econometrics forecast of September, 1983.

which is not reduced when current yield prospects are low. Moreover, with below normal yield prospects, the grain received under the PIK component will be virtually the same as any production foregone as a result of PIK participation, while costs will be reduced. Because of this latter aspect, participation in only the RAP would not be attractive unless producers expected prices of less than $3.30/bushel.

An Alternate Wheat Program

Finally, there is still some speculation that the Administration's current program proposal will be amended to make it more attractive. One alternative being suggested includes a 20% unpaid diversion a 10% paid diversion with a $3.00/bushel diversion payment and a 20% PIK option with a payback rate of 85%. Since winter wheat has now been planted, producers wishing to join the program would already have substantial sums invested in inputs. Therefore, in analyzing these options, a higher level of conservation costs was assumed, namely, the same level as 1983 PIK costs.

The results, presented in Figure 4 indicate that for producers of winter wheat this amended program is no more attractive than the administration's current proposal. The diversion payment and the higher PIK payback rate are offset by the fact that producers deciding to join at the present time will see their costs reduced less than will producers who decided to join earlier because inputs have already been applied in the case of the former group. Because of the reduced cost saving, the break-even price for non-participation would be $3.80/bushel, the same as for the current program when it was first announced. Moreover, the best alternative to non-participation is participation in the RAP only. At no price level does PIK participation yield the highest net returns. For spring wheat producers, the amended program described above would be more attractive and would result in greater participation.

ANALYTICAL RESULTS FOR THE CORN PROGRAM

The results of the analysis of participation incentives for the 1983 corn program are presented in Figure 5. They indicate that before the PIK option was announced, the break-even price for non-participation was about $2.70/bushel. With price expectations in the fall of 1982 at about $2.60/bushel, participation was expected to be low.

With the addition of the PIK program the break-even price for non-participation was increased to about $2.90/bushel. Since this is some $.30/bushel above the expected market price, it provided a strong incentive for participation.

The 1984 corn program is less attractive. As shown in Figure 6, the break-even price for non-participation is about $2.90/bushel. This is at about the same level as current expectations for the 1984-85 average farm price. Thus, relative to 1983-84, the incentive to participate is reduced.

CONCLUSION

Analysis of budgets for an "average" producer suggest that the proposed changes to the 1984 wheat program would have the following effects:

(1) The PIK option would not likely be attractive to producers.

(2) The minimum price required for non-participation to be the most profitable option would be reduced from $4.30/bushel to $3.80.

(3) At the current expected 1984-85 price of $3.66/bushel, RAP would be the wheat producer's most profitable option, but the margin over non-participation would be much lower than in 1983-84.

The probable consequence of these changes is that participation in both the Reduced Acreage Program and the PIK option will be reduced in 1984.

Spring wheat producers in particular will find the attractiveness of PIK participation reduced, since for them there is no cost saving to offset the lower PIK payback rate.

Wheat producers with low yield prospects are likely to find the RAP/PIK program attractive. However, recent rains in winter wheat producing areas are likely to make this factor less important.

Analysis of a possible alternative program, one encompassing a 30% reduced acreage program which includes a 10% paid diversion as well as an optional 30% payment in kind component with an 85% payback rate, reveals that such a program would not improve the incentives for non-participating winter wheat producers to join. Moreover, despite the higher payback rate, the PIK option is still not attractive. The margin for RAP participation over non-participation would in fact be higher than in 1983-84. However, the alternative program would be more attractive for spring wheat producers since they have not already incurred planting costs.

On balance, for most wheat producers the incentives to participate in the current proposed program are less than in 1983-84. Unless yield prospects are reduced for most producers in 1984-85 or price expectations for 1984-85 are further reduced, program participation is likely to fall. An increase in wheat acreage can therefore be expected.

Corn producers will not find the incentives to participate as attractive as in 1983. Moreover, those participating will be required to set aside only 10% of their base acreage compared to 20% for RAP participants and from 30 to 100% for PIK participants in 1983. Both of these factors will work toward a significant increase in corn acreage in 1984.

APPENDIX A: SELECTED ASPECTS OF U.S. CROP PROGRAMS

Each year the United States Department of Agriculture announces a program for wheat, feed grains and a number of other crops. Participation in these programs is voluntary. As a condition of participation, producers may be asked to divert land to conservation use. If no diversion is required, all producers are considered to be participants. Associated with each program are a number of terms which require definition.

BASE ACREAGE

Each producer is assessed a base acreage calculated from plantings in previous years. Land diversions are calculated from the base. In 1983-84 a producer's base acreage is equal to the higher of his average planted acreage in 1980 and 1981 or his 1981 acreage. For 1984-85 his base acreage will be the average of his planted acreage in 1982 and 1983 plus acreage diverted under government programs.

PROGRAM YIELD

A producer's program yield is equal to his average yield for the previous five years.

TARGET PRICE

As the name implies, this is the price which the program aims to provide for program participants. For 1983-84 the target price is $4.30/bushel.

LOAN RATE

Program participants are eligible to obtain 9-month loans at a nominal rate of interest using stored grain as collateral. The loan rate is the loan allowed per bushel of grain. At the end of the 9-month period, a producer may repay the loan and accrued interest or may sign the grain over to the Commodity Credit Corporation.

DIVERSION PAYMENT

In some cases producers are offered a cash payment to compensate the producer for diverting land to conservation purposes. The amount received by producers is calculated as follows: diversion payment ($/bushel) X producer's program yield X eligible diverted acres.

DEFICIENCY PAYMENTS

If the average farm price in the first 5 months of the crop year is less than the target price, participating producers receive deficiency payments according to the following formula: (target price - average farm price) X producer program yield X eligible planted acreage.

APPENDIX B

WHEAT PROGRAM WORKSHEET: 1984

	Non-participant	RAP participant	RAP/PIK participant
Area planted (acres)	1.00	0.70	0.50
Yield (bushels/acre)	35.00	38.00	40.00
Production (bushels)	35.00	26.60	20.00
Price ($/bushel)	3.25	3.25	3.25
Effective price [1] ($/bushel)	3.25	3.30	3.30
Revenue ($)	113.75	87.78	66.00
Variable cost ($)	65.00	45.50	32.50
Deficiency payment ($/bushel)	-	1.15	1.15
Deficiency payment [2] ($)	-	28.18	20.13
Diversion payment ($/bushel)	-	-	-
Paid diversion	-	-	-
Diversion payment ($)	-	-	-
Conservation cost [3] ($)	-	3.00	5.00
PIK grain (Bushels)	-	-	5.25
Value ($)	-	-	17.06
Net revenue ($)	48.75	67.46	65.69

[1] If market price is below loan rate the effective price for participants is equal to the loan rate.

[2] Deficiency payment is made to a participant on the basis of his program yield, which for this analysis is assumed to be 35 bushels/acre

[3] PIK Grain received = acres idled under PIK X 0.75 X program yield

APPENDIX C

1983 WHEAT PROGRAM

Farm price	Non-participant	RAP	RAP/PIK
- ($/bushel) -	-	Net revenue/acre	-
3.50	57.50	74.31[1]	74.05
3.60	61.00	74.31	75.02[1]
3.70	64.50	74.43	76.14[1]
3.80	68.00	74.67	77.41[1]
3.90	71.50	74.91	78.68[1]
4.00	75.00	75.15	79.95[1]
4.10	78.50	75.39	81.22[1]
4.20	82.00	75.63	82.49[1]
4.30	85.50[1]	75.87	83.76
4.40	89.00[1]	78.83	86.73

loan rate = $3.65/bu
diversion payment = $2.70/bu
unpaid diversion = 15%
non-participant yield = 35 bu/ac
RAP participant yield = 37 bu/ac
RAP/PIK participant yield = 40 bu/ac
program yield = 34 bu/ac

target price = $4.30/bu
paid diversion = 5%
PIK diversion = 30%
PIK payback rate = 95%
PIK costs = $40/ac
conservation costs = $20/ac
variable cost = $65/ac

CURRENT 1984 WHEAT PROGRAM, NORMAL YIELDS

Farm price	Non-participant	RAP	RAP/PIK
- ($/bushel) -	-	Net revenue/acre	-
3.50	57.50	64.87[1]	62.50
3.60	61.00	65.09[1]	63.28
3.70	64.50	65.29[1]	64.05
3.80	68.00[1]	65.51	64.82
3.90	71.50[1]	65.71	65.60

loan rate = $3.30/bu
diversion payment = 0
unpaid diversion = 30%
non-participant yield = 35 bu/ac
RAP participant yield = 38 bu/ac
RAP/PIK participant yield = 40 bu/ac
program yield = 35 bu/ac

target price = $4.45/bu
paid diversion = 0
PIK diverson = 20%
PIK payback rate = 75%
PIK costs = $20/ac
conservation costs = $20/ac
variable cost = $65/ac

[1]most profitable option

CURRENT 1984 WHEAT PROGRAM, LOW YIELDS

Farm price	Non-participant	RAP	RAP/PIK
- ($/bushel) -	-	Net revenue/acre	-
3.20	31.00	52.91[1]	52.17
3.30	34.00	52.91[1]	52.70
3.40	37.00	52.77	53.22[1]
3.50	40.00	52.63	53.75[1]
3.60	43.00	52.48	54.27[1]
3.70	46.00	52.35	54.80[1]
3.80	49.00	52.21	65.32[1]
3.90	52.00	52.07	55.85[1]
4.00	55.00	51.93	56.38[1]
4.10	58.00[1]	51.78	56.90

loan rate = $3.30/bu
diversion payment = 0
unpaid diversion = 30%
non-participant yield = 30 bu/ac
RAP participant yield = 33 bu/ac
RAP/PIK participant yield = 35 bu/ac
program yield = 35 bu/ac

target price = $4.45/bu
paid diversion = 0
PIK diversion = 20%
PIK payback rate = 35%
PIK costs = $20/ac
conservation costs = $20/ac
variable cost = $65/ac

ALTERNATE 1984 WHEAT PROGRAM, NORMAL YIELDS

Farm price	Non-participant	RAP	RAP/PIK
- ($/bushel) -	-	Net revenue/acre	-
3.50	57.50	67.66[1]	64.23
3.60	61.88	67.87[1]	65.07
3.70	64.58	68.00[1]	65.91
3.80	68.00	68.29[1]	66.76
3.90	71.50[1]	68.50	67.61
4.00	75.00[1]	68.21	68.45

loan rate = $3.30/bu
diversion payment = $3.00/bu
unpaid diversion = 20%
non-participant yield = 35 bu/ac
RAP participant yield = 38 bu/ac
RAP/PIK participant yield = 40 bu/ac
program yield = 35 bu/ac

target price = $4.38/bu
paid diversion = 10%
PIK diversion = 20%
PIK payback rate = 85%
PIK costs = $40/ac
conservation costs = $40/ac
variable cost = $65/ac

[1]most profitable option

1983 CORN PROGRAM

Farm price	Non-participant	RAP	RAP/PIK
- ($/bushel) -	-	Net revenue/acre	-
2.60	127.00	138.04	150.78[1]
2.70	138.00	138.52	153.55[1]
2.80	149.00	139.48	156.70[1]
2.90	168.00[1]	143.84	161.85
3.00	171.00[1]	152.60	170.00
3.10	182.00[1]	161.56	178.15
3.20	193.00[1]	178.52	186.38
3.30	204.00[1]	179.48	194.45
3.40	215.00[1]	188.44	202.68
3.50	225.00[1]	197.40	210.75

loan rate = $2.65/bu
diversion payment = $1.50/bu
unpaid diversion = 10%
non-participant yield = 110 bu/ac
RAP participant yield = 112 bu/ac
RAP/PIK participant yield = 115 bu/ac
program yield = 100 bu/ac
target price = $2.86/bu
paid diversion = 10%
PIK diversion = 30%
PIK payback rate = 80%
PIK costs = $20/ac
conservation costs = $20/ac
variable cost = $159/ac

CURRENT 1984 CORN PROGRAM

Farm price	Non-participant	RAP
- ($/bushel) -	-	Net revenue/acre -
2.60	127.00	156.05[1]
2.70	138.00	156.41[1]
2.80	149.00	156.77[1]
2.90	168.00[1]	157.13
3.00	171.00[1]	157.49
3.10	182.00[1]	164.59
3.20	193.00[1]	174.58
3.30	204.00[1]	184.57
3.40	215.00[1]	194.86
3.50	226.00[1]	284.55

loan rate = $2.55/bu
diversion payment = 0
unpaid diversion = 10%
non-participant yield = 110 bu/ac
RAP participant yield = 111 bu/ac
target price = $3.03/bu
paid diversion = 0
program yield = 107 bu/ac
conservation costs = $20/ac
variable cost = $159/ac

[1]most profitable option

FIGURE I 1983 WHEAT PROGRAM

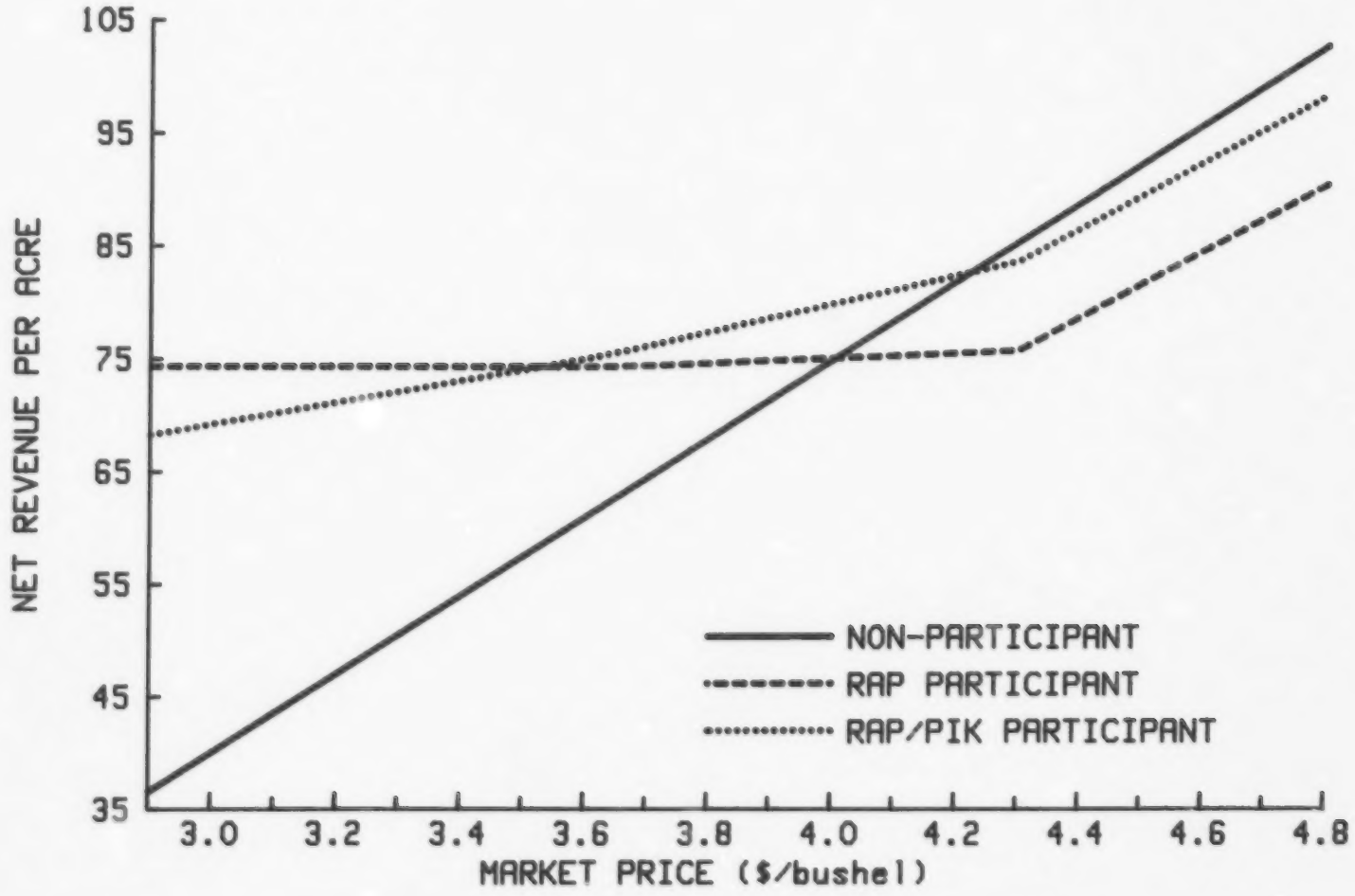


FIGURE II PROPOSED 1984 WHEAT PROGRAM

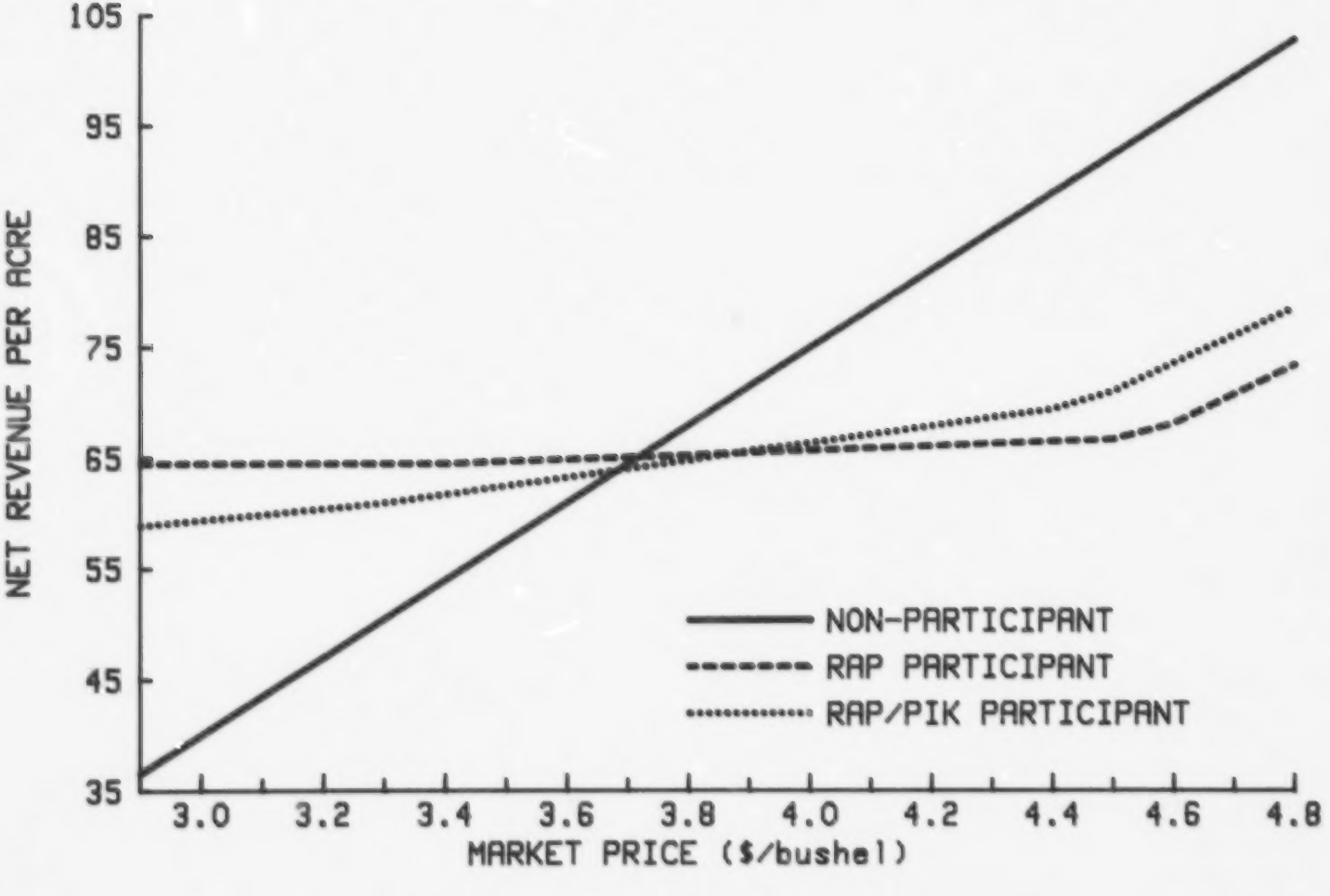


FIGURE III PROPOSED 1984 WHEAT PROGRAM (LOW YIELDS)

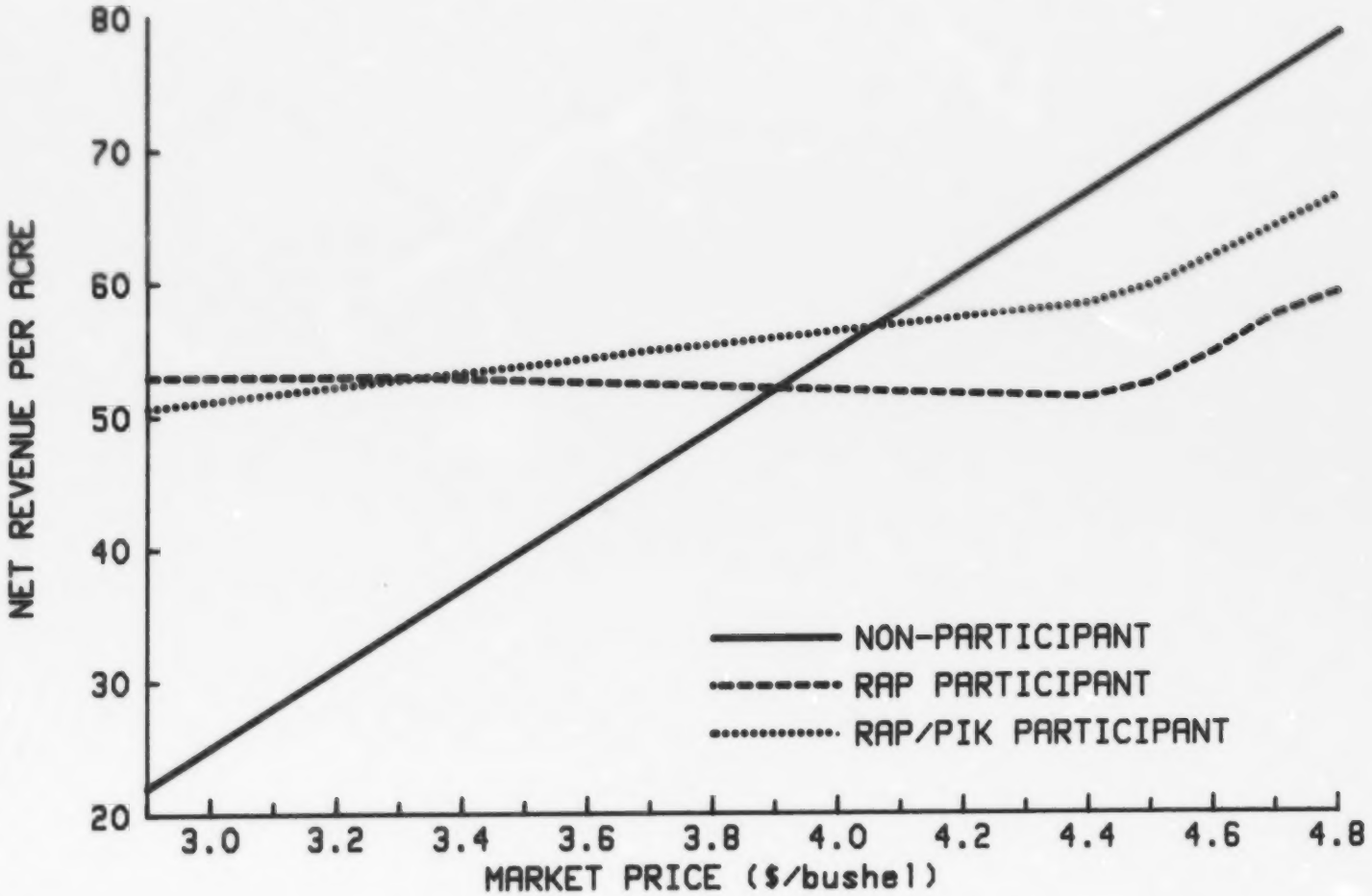


FIGURE IV ALTERNATIVE 1984 WHEAT PROGRAM

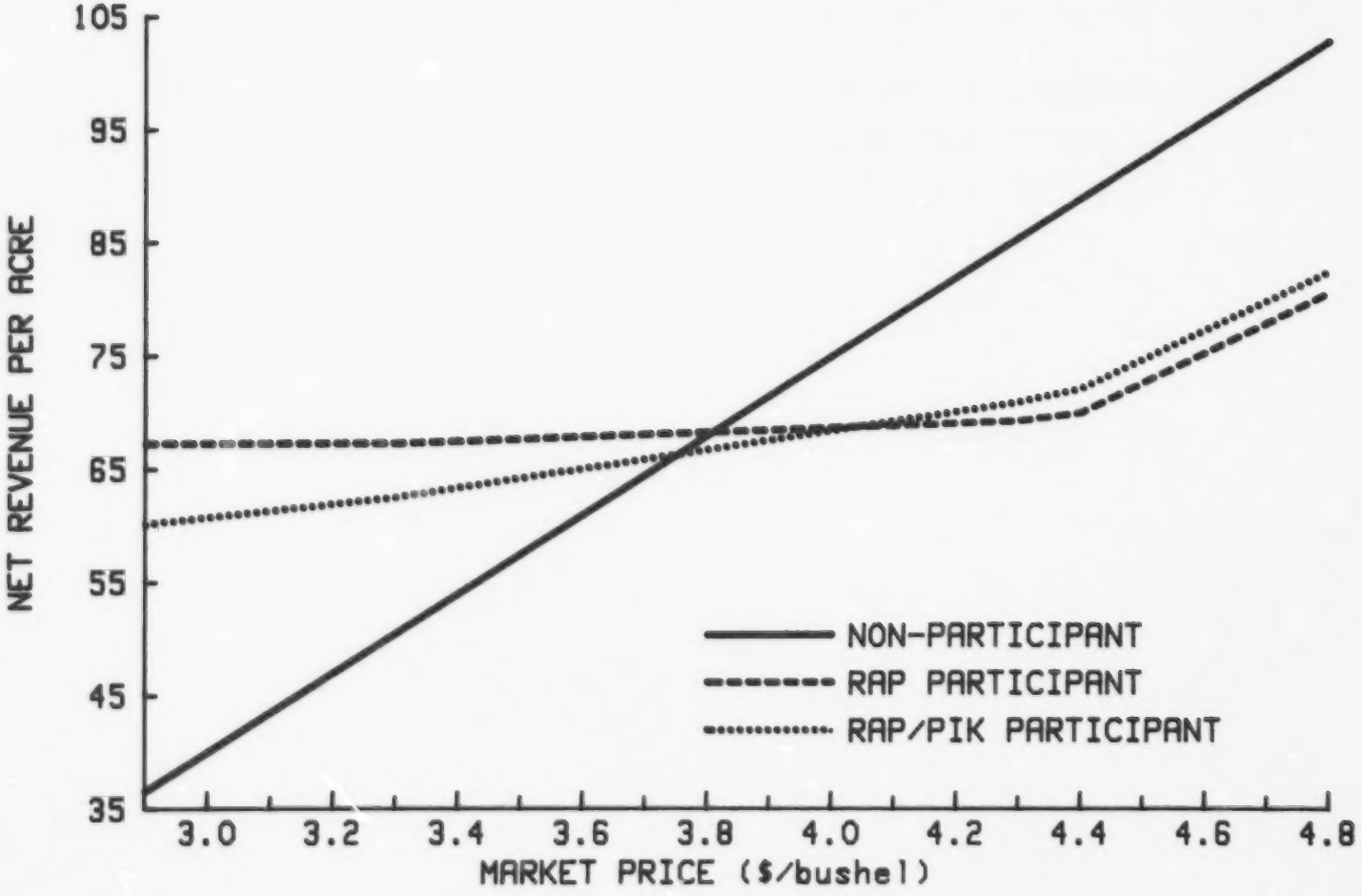


FIGURE V 1983 CORN PROGRAM

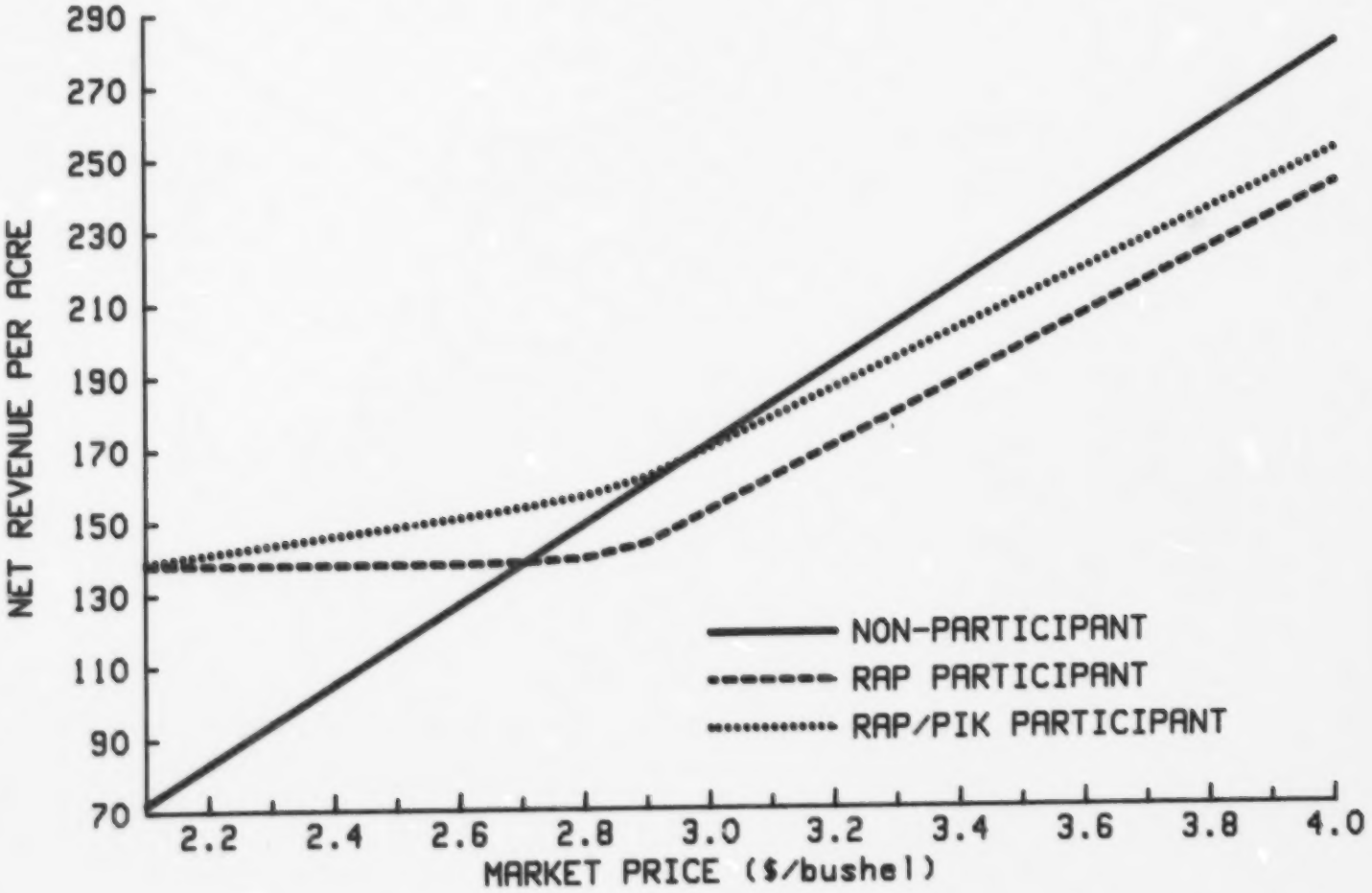
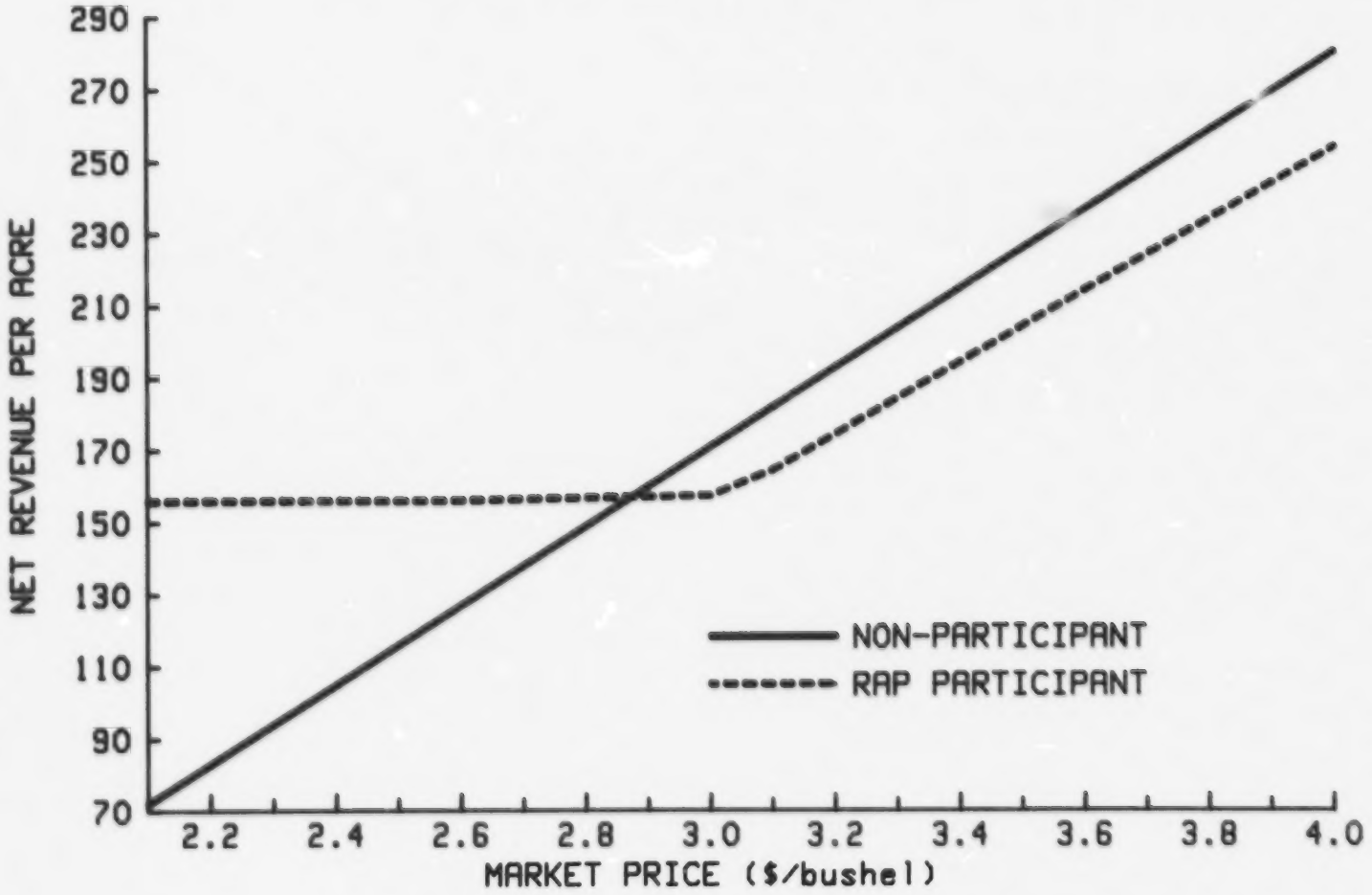


FIGURE VI PROPOSED 1984 CORN PROGRAM



LIVESTOCK

BEEF CATTLE SITUATION AND OUTLOOK

A. Boswell
L. Young

HIGHLIGHTS

With the exception of the second quarter, the Canadian beef industry in 1983 was characterized by a continued poor financial position. Cattle feeding profits were nullified during the last half of 1983 by declining market prices and rising feed costs. Expectations of higher fed cattle prices in 1983 were also diminished by continued weak consumer demand and a sharp increase in pork supplies.

Recent cattle inventory reports indicate relatively tighter beef supplies in 1984 in both Canada and the U.S. Together with lower pork supplies, particularly during the latter half of the year, and improved economic conditions, this should result in higher average prices than in 1983. Burdensome supplies of competing meats will continue to put pressure on cattle prices this winter.

BEEF CATTLE PRICES DROP IN SUMMER OF 1983

Following an increase in North American beef cattle prices during the 1983 spring period, prices came under pressure during the summer from an increased beef output, large supplies of competing meats (in particular sharply rising pork supplies), and continued slow consumer demand for meat. A1, A2 slaughter steer prices at Toronto during 1983 rose from $76.59/cwt in January to a monthly high of $84.55 in April, and steadily declined to $73.91 by September (Table 1).

Slaughter cows and feeder cattle prices also declined throughout the late summer period, but prices for feeder steers traded above those for slaughter steers at most Canadian markets.

In Canada, 1983 has been a relatively poor year for beef cattle producers. Despite higher slaughter cattle prices in the second quarter, cattle feeding profits during the balance of the year were eroded by higher feed costs and increased breakeven prices, as well as lower slaughter cattle prices. The movement of feeder cattle prices during 1983 continued to reflect the general level of slaughter steer and feed prices, rising from winter levels in the spring period and declining through the summer months.

TABLE 1. MONTHLY PERCENT CHANGE IN BEEF OUTPUT FROM YEAR EARLIER AND BEEF CATTLE PRICES PER CWT

	Inspected beef output		Slaughter steers		Slaughter cows		Feeder steers	
			Toronto	Omaha	Winnipeg	Omaha	Winnipeg	Kansas City
	Can.	U.S.	A1,A2	Choice	D3-D5	Utility	600-700 lbs	
	%	%	Can$	U.S.$	Can$	U.S.$	Can$	U.S.$
Year								
1982	1	1	80.54	64.22	42.73	39.96	72.68	64.82
1983								
January	10	4	76.59	59.33	39.89	36.94	73.88	65.30
February	-1	-1	78.12	61.20	44.80	40.92	77.00	67.35
March	-2	-1	79.15	64.03	47.85	42.36	79.85	69.19
April	10	-2	84.55	67.70	48.58	43.04	79.64	68.38
May	-1	8	83.31	67.51	49.67	42.98	77.58	67.62
June	6	6	82.59	65.90	50.74	42.26	77.44	64.75
July	9	1	78.22	62.22	49.19	41.14	74.03	60.13
August	3	9	76.15	61.27	46.79	39.63	72.58	58.58
September	-4	5	73.91	59.19	43.47	37.75	71.03	58.31
October[p]	2	N.A.	74.13	59.58	41.50	37.43	73.41	60.20
November[e]			75.25	58.38	37.13	33.50	73.93	60.00
Jan.-Nov.[p]	3	3	78.40	62.40	45.45	39.85	75.50	63.65

[e]First 2 weeks of November.
[p]Preliminary

CANADA'S CATTLE MARKETINGS TO MID-NOVEMBER 1983 UNCHANGED FROM A YEAR AGO

Allowing for live cattle imports of U.S. cattle for immediate slaughter (primarily fed cattle) and live exports of cattle from Canada to the U.S. for slaughter (primarily cows), Canada's net cattle marketings to November 12 were 1% above the relatively high level during January-November 1982 (Table 2).

Canada's federally and provincially inspected cattle slaughter to November 12, 1983 was virtually unchanged from the corresponding period in 1982, and this was the case for both eastern and western Canada (for provincial details see Table 9). Because of higher average carcass weights, 605 pounds compared to 584 pounds, beef output to mid-November averaged about 3% higher than in the similar period in 1982. U.S. inspected cattle slaughter to November 5, 1983 was up 3% from the corresponding period the year before.

CANADA'S SUMMER 1983 FEMALE CATTLE SLAUGHTER DROPS BACK

Canada's cow and heifer slaughter for 1982 rose 16 and 5% respectively from that of the year earlier and in the U.S. 12 and 5% higher. To mid-November, 1983, Canada's cow slaughter averaged about 2% above a year earlier, but during the summer period slaughter dropped below 1982 rates, the first decline in over two years. The first half 1983 increase in national cow slaughter primarily occurred in the dairy-cow producing region of eastern Canada, whereas in the beef-cow producing region of western Canada, cow slaughter dropped in the second quarter. Canada's heifer slaughter in 1983 dropped below year earlier levels in the third quarter (Table 3), with all the decrease occurring in western Canada.

TABLE 2. CANADA: NET CATTLE MARKETINGS AND PERCENTAGE CHANGE FROM A YEAR EARLIER

	1981		1982		Jan. 1-Nov. 12 1983	
	'000 hd	%	'000 hd	%	'000 hd	%
Inspected cattle slaughter	3 292	5	3 361	2	2 923.7	N.C.
Cattle imports[1] 700 lb & over	156	142	79	-49	56.7	3
Domestic cattle slaughter	3 136	2	3 282	5	2 866.9	-1
Cattle exports[1] 700 lbs & over	133	-13	223	68	145.7	29
Net cattle marketings	3 269	1	3 505	7	3 012.7	1

[1]For slaughter: source for 1981-82, Statistics Canada; for 1983, Agriculture Canada.

In the United States, 1983 cow slaughter rose during the late summer months, reflecting widespread dry weather conditions. U.S. heifer slaughter, however, increased to exceptionally high levels through the first half of 1983. In both countries, steer slaughter has remained virtually the same as in 1982.

TABLE 3. PERCENT CHANGE OF INSPECTED FEMALE CATTLE SLAUGHTER FROM YEAR BEFORE

	East		West		Canada		U.S.	
	Cows	Heifers	Cows	Heifers	Cows	Heifers	Cows	Heifers
1979	-24	-9	-25	-20	-25	-16	-30	-17
1980	+ 6	+8	+ 6	+ 6	+ 6	+ 6	+ 7	- 1
1981	- 2	-2	+ 5	+ 5	+ 4	+ 3	+ 5	+ 5
1982	+17	+3	+14	+ 5	+16	+ 5	+12	+ 5
1983								
1st Q.	+27	-5	+ 1	+ 2	+13	- 1	- 2	+11
2nd Q.	+ 8	+2	- 5	+ 1	+ 2	+ 1	+ 1	+ 9
3rd Q.	+ 2	N.C.	-16	- 7	- 7	- 4	+ 7	+ 1
Jan.-Nov.	+12	N.C.	- 7	- 2	+ 2	- 2	+ 2	+ 5

The relatively higher level of female cattle slaughter since 1980 in both Canada and the U.S. is unusual for the present phase of the cattle cycle when cattle numbers on farms, especially beef cattle, are low. Also, the high level of cattle slaughter since 1980 has been largely a result of larger numbers of cows and heifers in the slaughter mix. Increased beef female cattle slaughter in both Canada and the U.S. reflected the continued unfavorable economic conditions in the beef industry, namely, high interest rates and low feeder cattle prices, together with the need to generate farm capital. In addition, increased dairy cow slaughter in 1982 and early 1983 occurred in dairy producing regions of both countries, reflecting tighter milk requirements.

CANADA'S CALF SLAUGHTER REMAINS HIGH IN 1983

Inspected calf slaughter increased through the early 1980s. In 1983 national calf slaughter to mid-November was up 9% from a year earlier with all of the increase ocurring in the dairy producing regions of eastern Canada. Following sharp annual increases since 1981, U.S. inspected calf slaughter to November this year was virtually the same as a year earlier.

OUTLOOK

LOWER NAITONAL BEEF SUPPLIES EXPECTED IN 1984

The main implications of Canada's 1983 mid-year report on cattle inventory on farms and ranches reveals that domestic beef supplies for 1984 can be expected to average below the 1983 level, and that the increases in the nation's cattle herd which began during 1980-81 have reversed to an unprecedently quick inventory reduction.

According to Statistics Canada, the estimated total inventory of cattle and calves on Canadian farms as of July 1, 1983 declined to 12.59 million head, down 3.5% from 1982, and 5.8% below 1981 (Table 4). The number of beef cows that have calved, an important indicator of herd development, decreased 3% from July 1, 1982. Heifers held for beef herd replacements were estimated to be about 4% below a year earlier as of July 1.

TABLE 4. CATTLE NUMBER ESTIMATES ON FARMS, JULY 1

	Canada				U.S.			
	1981	1982	1983	1983/1982	1981	1982	1983	1983/1982
	- mil. head -			- % -	- mil. head -			- % -
Beef cows	3.52	3.41	3.30	-3	40.08	38.97	38.52	-1
Beef heifers[1]	0.70	0.67	0.64	-4	6.23	6.12	5.80	-5
Dairy cows	1.78	1.76	1.72	-2	10.92	11.02	11.08	+1
Dairy heifers	0.75	0.75	0.73	-3	4.63	4.78	4.88	+2
Young cattle								
Other heifers	0.79	0.80	0.77	-3	7.50	7.65	7.89	+3
Steers	1.67	1.63	1.57	-4	16.25	16.34	16.84	+3
Bulls	0.27	0.26	0.25	-2	2.64	2.61	2.56	-2
Calves	3.89	3.76	3.61	-4	36.55	36.65	35.97	-2
Total young	6.62	6.44	6.20	-4	62.94	63.25	63.26	N/C
Total	13.36	13.04	12.59	-3	124.80	124.14	123.54	-1

[1]For replacement

The total number of young cattle on Canadian farms as of July 1, 1983, which will form the basis of 1984 beef output, was estimated to be more than 3% below a year ago and over 5% below 1981. Steer and heifer numbers, the main source of cattle slaughter in the early part

of 1984, were both down by more than 3%. July 1, 1983 calf numbers, the largest source of cattle slaughter in the last half of 1984, were 4% below 1982.

The composition of Canada's beef output through 1984 in regard to sex of slaughter, carcass weights, degree of cattle feeding, and also forage and crop conditions will be an important factor influencing future beef supplies.

In addition to a smaller supply of feeder cattle, the level of cattle feeding and carcass weights will depend greatly on two factors. First, 1983 grain production and fodder corn production, primarily in Ontario, are both expected to be more than 10% below last year's crops. Second, western Canadian barley production in 1983, along with carryover stocks, will bring national barley supplies for 1983-84 to more than 10% below those of a year earlier. Coarse grain prices will reflect those in the U.S. market, where a higher 1983-84 crop year average price is expected than a year before.

On balance, Canada's beef output for 1984 may be expected to average 3% or more below the 1983 level (Appendix A). The decrease may be expected to be proportionately greater in the second half than in the first half of the year. If rebuilding of beef cow herds by increasing heifer replacements begins in 1984, then Canada's beef output could show a larger decrease from the 1983 level than indicated.

U.S. BEEF SUPPLIES EXPECTED TO BE LOWER IN 1984

The USDA mid-year report on cattle inventory shows that the number of animals on farms was about the same as a year ago. The July 1, 1983 report estimated that there was about 123.5 million cattle and calves in the U.S. compared to last year's total of 124.1 million, down only 0.5% and only 1% below 1981. While the inventory declines are moderate, the 1983 reductions in beef cow numbers of 1% together with a 5% decline in beef heifers for herd replacements imply that the total cattle inventory could be reduced further, following a period (1980-82) when total inventories showed sizeable year-to-year increases.

The release of the October 1, 1983 U.S. Cattle-on-Feed Report points to a continued high level of fed cattle marketings into the winter of 1984. Total numbers on feed as of October 1 were down 4% from the same date in 1982. Cattle on feed over 700 pounds were about 1% higher but the number below 700 pounds was over 10% below last year's level.

The USDA November 1983 crop production estimates confirm early indications of a sharp drop in 1984 grain supplies. The U.S. corn crop was estimated at about 104.7 million tonnes, compared to 213.3 million tonnes in 1982. Total U.S. feed grain production for 1983 is expected to be down more than 45% from 1982 and soybean production down over 30%.

According to the USDA, as of early November total U.S. beef output for 1984 is expected to average around 3-4% below 1983. Beef output is projected to rise 2% during the first quarter, drop below year-earlier levels in the second quarter, and for the balance of the year average 4% or more below July-December 1983 levels. Fed cattle marketings and non-fed steer and heifer slaughter are expected to drop below 1983 levels, particularly in the second half of 1984. One factor which clouds the U.S. 1984 beef outlook is the number of additional dairy cows slaughtered if proposed dairy legislation is enacted. In 1983 the effective support price for U.S. milk was reduced from $13.10 to $12.10/cwt. Without any additional dairy legislation being enacted this price reduction is not expected to significantly increase 1984 dairy cow marketings.

SLAUGHTER CATTLE PRICES EXPECTED TO STRENGTHEN THROUGH 1984

With tighter beef supplies and slowly declining pork supplies expected through 1984, the general price level for beef cattle is expected to strengthen. The strength of the ongoing economic recovery in North America and the expectation that it will last through 1984 may add some support to consumer demand for meat. However, uncertainty regarding preferences for meat by consumers remains a very real concern for meat producers. If consumers return to their historical spending pattern as the economy continues to recover, livestock prices may show additional strength in 1984, particularly beef cattle prices. Another uncertainty about future cattle prices, in particular cow slaughter prices, relates to the final outcome of the new U.S. dairy support legislation.

During 1981, 1982 and 1983, the unprecedented intrayear fluctuation in fed-slaughter cattle prices from high point to low point has been in the range of $10 to over $15/cwt. In 5 out of the past 6 years (1978-1983) fed cattle prices hit their annual high during the second quarter of the year. A1, A2 slaughter steers at Toronto rose from $76.59/cwt in January 1983 to a monthly high of $84.55 in April, followed by a decline to about $74.00 in October. In more recent years, this seasonal price pattern underlies the comparatively higher cattle feeding profits during the late spring and summer months than in other periods or seasons. In part, this situation reflects the fact that cattle slaughter levels and competing meat supplies have been seasonally lower during the spring period.

In the U.S., Choice steer prices at Omaha during 1983 rose from U.S. $59.33 in January to $67.70/cwt in April, followed by a decline to around $59.60 in October. According to the USDA in early November, Choice steer prices are expected to strengthen into 1984 and average in the $62-$66 range during the first quarter, rising in the second quarter into the $66-$70 range. Summer prices should average near the $70 mark followed by seasonally weaker prices in the fall period. In 1984, U.S. Choice steer prices at Omaha may be expected to average in the U.S. $64-70 range, compared with an estimated average of about $62/cwt for 1983.

Assuming for no significant change from November levels in the value of the Canadian dollar and Canadian fed cattle prices averaging between an export and import basis with U.S. prices, A1, A2 steer prices at Toronto should strengthen through the first half of 1984 and average around the $80 level. Prices may be expected to be higher through the summer period, followed by some seasonal fall weakness. In 1984, the average at Toronto may be expected to be in the $80-$85 range compared with an estimated $78.25 in 1983 (Appendix A).

In 1983, Canada's per capita beef consumption may be expected to average near the 1982 level of 40.43 kg (89.1 lb) and the 1981 level of 40.95 kg (90.3 lb).

FEEDER CATTLE PRICES

During the past three years, feeder cattle prices have been relatively stable for the most part, and largely unprofitable for cow-calf producers. A number of factors contributed to the low feeder cattle prices, notably that cattle-feeding margins were frequently negative as well as associated factors such as high interest rates and the general economic recession.

TABLE 5. QUARTERLY PERCENT CHANGE IN BEEF OUTPUT FROM YEAR AGO, BEEF CATTLE PRICES AND TOTAL PERSONAL DISPOSABLE INCOME

	Beef output		Slaughter steers		Feeder[a] steers		Total[b] disposable personal income	
	Canada	U.S.	A1,A2 Toronto	Choice Omaha	Winnipeg	Kansas City	Can.	U.S.
	- % -		-	Can $/cwt		-	- Bil $	-
1982								
1st Q.	2	-2	75.69	76.63	65.98	76.25	100.1	1,039
2nd Q.	-4	-1	87.65	87.70	75.15	82.73	98.7	1,044
3rd Q.	5	3	81.87	80.26	74.99	83.14	98.7	1,054
4th Q.	2	2	75.05	72.49	72.80	77.86	97.9	1,058
Year	2	1	80.54	79.27	72.68	79.99	-	-
1983								
1st Q.	3	1	77.95	75.50	76.91	82.57	96.1	1,064
2nd Q.	5	3	83.48	82.53	77.32	82.38	95.0	1,070
3rd Q.[p]	2	4	76.09	75.07	72.55	72.74	97.8	1,076
4th Q.[p]	2	1	75.50	74.50	74.00	74.40	-	-
Year[p]	3	3	78.25	76.90	75.20	78.00	-	-

[a]600-700 pounds
[b]Real; Can. 1971 $, U.S. 1972 $
[p]Preliminary

During the first three quarters of 1983, the movement of feeder cattle prices continued to follow the fed slaughter cattle market (Table 5). Feeder steers (600-700 pounds) at Winnipeg rose from $73.88/cwt in January to a high of $79.65 in April, followed by a steady decline to about $71 by September. Prices strengthened during October and in 1983 should average in the $75-$76 range, compared to $72.68 in 1982. Prices for all classes of feeder cattle in 1983 will average above respective 1982 rates, but most of the price strength has occurred in the second quarter. The drop in feeder cattle prices during the summer months attests to poor feedlot demand, which reflects declining fed cattle prices and the negative impact of rising feed costs.

Prospects for stronger fed slaughter cattle prices during 1984, a smaller supply of feeder cattle, and expectations that interest rates may not increase could cause stronger average feeder cattle prices in 1984 relative to 1983.

LONG RANGE OUTLOOK

The cattle number cycle for many decades has been an important analytical tool for looking into the future of the North American beef cattle industry. Until the early 1980s, the average inventory expansion of the last three cycles has been about seven years. Each of these inventory expansion cycles peaked about mid-decade, each at a much higher number level than the previous one. The last cycle peaked in 1975 in both Canada and the U.S., and was followed by an unprecedented large inventory liquidation lasting until 1979.

Much discussion has centered on the relatively short upturn in 1980-81 cattle inventories in both countries followed by a downturn in 1982-83. Although the total U.S. inventory declined only slightly during the last two years, the composition has changed in that beef cow inventories showed a much larger decrease.

The high levels of cattle slaughter in both Canada and the U.S. during the early 1980s has been largely a result of increased numbers of cows and heifers in the slaughter mix (Table 6). This increase in female slaughter reflected the unfavorable economic conditions faced by cow-calf producers, largely as a result of declining feeder cattle prices and tighter dairy milk requirements in both countries. The higher level of female slaughter contributed to subsequent declines in total cattle inventories on farms and ranches during 1982-83.

In the short run, if inventory estimates are valid, sometime in the near future cattlemen will begin to send decreasing numbers to market. In the longer term, significant increases in beef output must follow a buildup in the basic beef cow inventory. If and when herd expansion occurs, the process will involve holding back more cows and heifers normally destined for slaughter, as was the case in the early 1970s. The prospects of lower beef supplies and some improvement in the North American economy should increase the overall level of beef cattle prices in 1984 with further gains expected in 1985.

TABLE 6. CANADA: TOTAL INVENTORY OF CATTLE/CALVES ON FARMS JULY 1 (U.S. JANUARY 1), COMMERCIAL CATTLE SLAUGHTER, AND ANNUAL PERCENT CHANGE IN FEMALE SLAUGHTER

	Total inventory		Total slaughter		Slaughter Cows	Slaughter Heifers	Steer prices[a] Slaughter	Steer prices[a] Feeders	Prime interest
	mil. head	%	mil. head	%	%	%	$/cwt	$/cwt	Rate %
CANADA									
Expansion									
1969	12.37	-1	3.18	- 5	-16	2	30.00	38.50	7.96
1970	12.83	4	3.16	- 1	- 8	-13	31.05	39.42	8.17
1971	13.27	3	3.34	6	9	7	33.15	41.08	6.48
1972	13.74	4	3.49	4	- 4	2	35.55	46.28	6.0
1973	14.25	4	3.44	- 1	1	-11	45.14	54.85	7.65
1974	15.32	8	3.68	7	- 2	20	48.76	41.90	10.75
1975	15.62	2	4.24	15	32	32	43.80	32.41	9.42
Reduction									
1976	15.06	-4	4.48	6	4	15	39.25	35.12	10.04
1977	14.29	-5	4.37	- 2	N/C	11	39.89	39.49	8.50
1978	13.35	-7	3.99	- 9	-12	-10	58.01	74.05	9.69
1979	13.24	-1	3.43	-14	-25	-16	76.11	104.36	12.90
Expansion									
1980	13.38	+1	3.53	3	6	6	76.06	88.53	14.25
1981	13.36	N/C	3.70	5	4	3	76.37	73.88	19.30
Reduction									
1982	13.04	-2	3.80	3	16	5	76.37	74.65	15.81
1983[p]	12.59	-3	3.78	N/C	2	- 1	73.50	79.60	11.25
U.S.									
Expansion									
1969	110.0	1	35.2	1	4	N/C	29.45	32.89	8.00
1970	112.4	2	35.0	- 1	-10	N/C	29.36	36.73	7.81
1971	114.6	2	35.6	2	5	- 1	32.39	36.84	5.69
1972	117.9	3	35.8	1	- 4	4	35.78	46.54	5.29
1973	121.5	3	33.7	- 6	5	-10	44.54	59.73	8.17
1974	127.8	5	36.8	9	20	4	41.89	39.23	10.75
1975	132.0	3	40.9	11	53	18	44.61	29.48	7.73
Reduction									
1976	128.0	-3	42.7	4	- 7	18	39.11	38.82	6.81
1977	122.8	-4	41.9	- 2	- 6	- 2	40.38	41.41	6.88
1978	116.4	-5	39.6	- 6	-13	1	52.34	64.24	9.17
1979	110.9	-5	33.7	-15	-30	-17	67.66	93.10	12.79
Expansion									
1980	111.2	1	33.8	1	7	- 1	67.04	86.67	15.44
1981	114.3	3	35.0	4	5	5	63.84	72.43	18.66
1982	115.6	1	35.8	2	12	5	64.22	68.16	14.58
Reduction									
1983[p]	115.2	N/C	36.8	2	3	5	62.25	72.07	10.72

[a]Canada: A1,A2 steers and feeder steer calves 400-500 lb at Winnipeg, Can $
U.S.: Choice steers Omaha and feeder steer calves Kansas City, U.S. $
[p]Preliminary

CANADA REMAINS NET EXPORTER OF DRESSED BEEF TO SEPTEMBER 1983

In terms of weight, Canada has been a net exporter of dressed beef and veal since 1981, following a period in the 1970s when Canada was a net importer. This switch in Canada's dressed beef trade reflects the low value of the Canadian dollar in relation to the U.S. dollar, high levels of cow slaughter, and larger supplies of competing meats.

Official trade data from Statistics Canada to September 1, 1983 shows that domestic exports of dressed beef and veal (fresh, frozen, cured) increased to 52.3 thousand tonnes, up 15% over the same 8 months in 1982 (Table 7). Imports of dressed beef and veal to September total 39.5 thousand tonnes, down 2% from the same months in 1982. Live exports of cattle and calves for beef and veal purposes to September 1 totaled 240.3 thousand head, down 19% from a year ago. Live imports for slaughter, on the other hand, rose to about 53.4 thousand head, up 36% from January-August 1982. During the early 1980s, Canadian prices for slaughter cows and slaughter veal calves have averaged at or near a full "export basis" with U.S. prices.

CANADA'S DRESSED BEEF AND VEAL TRADE VOLUNTARILY RESTRAINED

The Canadian government announced on August 19, 1983 that an arrangement had been concluded with the U.S. on trade in beef and veal between the two countries in 1983. The U.S. asked the principal beef exporters -- Australia, New Zealand, and Canada -- to restrain their exports voluntarily for the balance of 1983 so as not to trigger import quotas under the U.S. Meat Import Law. This agreement between Canada and the United States will limit Canada's exports to 59 000 t in 1983, but will not restrict exports of live cattle. Similarly, the U.S. has agreed that its exports will not exceed 10 400 t during this period. To implement this arrangement Canadian export permits will be required for all exports of fresh, chilled and frozen beef and veal to the U.S. effective August 22, 1983. In addition, Canadian import permits will be required for all imports of fresh, chilled and frozen beef and veal. Canada's imports of beef and veal for 1983 are not expected to exceed 61 000-63 000 t; this is below the minimum global access commitment of 65 136 t contained in the Canadian Meat Import Act.

U.S. BEEF IMPORTS

The U.S. Meat Import Act limits imports of fresh, chilled and frozen beef, veal, mutton and goat meat to adjusted quotas based on average 1966-77 meat imports. The adjustment considers the recent growth of U.S. meat production (the current 3-year moving average divided by the 1966-77 average) as well as a countercyclical beef factor (current 5-year moving average of cow slaughter divided by the current 2-year moving average). Imports cannot be restricted below 1.25 billion pounds. The law provides that a trigger point of 110% of the adjusted

quota of imports be computed. The 1983 trigger point is 1.231 billion pounds (110% of the adjusted import quota of 1.119 billion). The 1.25 billion pound figure would go into effect if imports were to exceed the trigger point.

Through the 1960-1982 period, U.S. beef and veal imports averaged 7.6% of U.S. production and 7.2% of U.S. consumption. In 1979, imports of beef and veal peaked at 2.43 billion pounds (carcass weight), more than 10% of U.S. consumption. U.S. beef imports in the first half of 1983 were 15% higher than in the first half of 1982 (Table 8). It was necessary to seek voluntary restraint agreements in the second half of 1983 in order to hold imports below the trigger level.

The U.S. beef market is segmented into the tablecloth market, which demands high quality cuts from grain-fed beef and the processing market, which demands leaner, lower-quality cuts for the fast-food industry, some of which is imported.

TABLE 7. CANADA'S DRESSED AND LIVE BEEF AND VEAL TRADE

Exports and imports	Average 1980	1981	1982	Jan. 1-Sept. 1 1983	Change
		('000 t)			(%)
Dressed exports[1]					
United States	41.8	52.4	55.8	48.3	+19
Others	6.7	6.8	6.9	4.0	-18
Total	48.5	59.2	62.7	52.3	+15
(mil. $)	127.3	146.3	161.1	128.4	+10
Beef offals					
United States	3.1	4.5	2.2	2.0	+35
United Kingdom	8.3	10.3	15.0	8.0	-15
Total	15.6	19.2	22.0	12.1	-15
(mil. $)	20.7	22.8	22.2	11.6	-19
		('000 head)			
Live exports[2]					
Slaughter cattle	152.2	130.9	221.7	157.5	+22
Feeder cattle	41.9	45.9	83.2	9.5	-79
Veal	116.7	125.2	153.6	73.2	-40
Total	310.8	301.9	458.5	240.3	-19
(mil. $)	136.1	108.8	181.0	118.1	+ 2
All exports	284.1	277.9	364.3	258.1	+ 4
		('000 t)			
Dressed imports[1]					
New Zealand	24.4	22.7	22.6	20.0	+31
Australia	22.7	19.8	21.3	8.1	-49
United States	5.9	9.9	9.3	7.4	+17
Others	-	1.3	3.8	4.0	+40
Total	53.0	53.7	57.0	39.5	- 2
(mil. $)	178.0	181.5	179.3	130.7	+ 2
Beef, canned	4.0	3.8	5.3	3.6	- 3
(mil. $)	14.3	14.1	16.9	10.6	-12
		('000 head)			
Live imports[2]					
Slaughter cattle	63.7	156.1	79.5	53.4	+36
(mil. $)	58.6	133.1	69.2	46.3	+26
All imports (mil. $)	250.9	328.7	265.4	187.6	+ 6

[1]Includes fresh, frozen, and cured

[2]Exports: slaughter 700 lb and over (318 kg and over), feeders 200-700 lb (91-318 kg), veal 200 lb (91 kg) and less, imports 700 lb and over (318 kg and over)

TABLE 8. U.S. EXPORTS AND IMPORTS OF BEEF AND VEAL

	Annual			To July 1	
	1980	1981	1982	1983	1983-82
	-	tonnes			-
Exports					
Fresh/frozen	55 003	68 608	78 781	41 138	+ 9
Pickled/cured	4 500	6 061	6 886	3 030	-25
Total	59 503	74 668	85 667	44 168	+ 6
Imports	702,796	602,846	662,333	355,517	+15

Source: USDA Washington

TABLE 9. FEDERALLY AND PROVINCIALLY INSPECTED CATTLE SLAUGHTER AND PERCENTAGE CHANGE FROM PREVIOUS YEAR

	1980		1981		1982		January to Nov. 12 1983	
	'000 hd	%	'000 hd	%	'000 hd	%	'000 hd	%
Atlantic provinces	50	-2	54	10	58	7	48	- 5
Quebec	230	22	263	14	294	12	274	7
Ontario	1 026	8	1 067	4	1 009	-6	865	- 2
East	1 306	10	1 385	6	1 360	-2	1 187	-
Manitoba	314	-3	311	-1	344	10	296	- 3
Saskatchewan	196	1	215	10	249	16	212	- 1
Alberta	1 263	-1	1 308	4	1 322	1	1 163	1
British Columbia	66	16	74	12	87	18	67	-12
West	1 839	N.C.	1 907	4	2 002	5	1 738	- 1
Canada[a]	3 145	4	3 292	5	3 361	2	2 924	-0.5
Beef output ('000 t)	856.9	3	892.5	4	905.3	1	728.4	3
U.S.[a]	31 642	N.C.	32 799	4	33 847	4	30 136	3
Beef output ('000 t)	9 739	1	10 076	3	10 145	1	8 037	3

[a] Inspected slaughter

TABLE 10. BEEF CATTLE PRICES AND PRICE SPREADS

	Slaughter steers		Slaughter cows		Feeder steers 600-700 lbs		Steers	Cows	Feeder
	A1,A2 Toronto	Choice Omaha	D3-5 Winnipeg	Utility Omaha	Winnipeg	Kansas City	Toronto / Omaha	Winnipeg / Omaha	Winnipeg / Kansas
	Can $/cwt								
1982									
January	74.12	72.44	39.69	43.69	62.82	71.64	1.68	-4.00	-8.82
February	75.75	77.14	39.01	46.27	66.76	76.82	-1.39	-7.26	-10.06
March	77.21	80.30	44.41	48.10	68.37	80.28	-3.09	-3.69	-11.91
April	83.07	84.65	44.55	50.54	71.92	80.93	-2.58	-5.99	-9.01
May	90.58	88.96	45.38	53.55	75.09	83.63	1.62	-8.17	-8.54
June	90.30	89.50	47.47	54.49	78.44	83.62	0.80	-7.02	-5.18
July	84.34	84.04	50.48	54.00	74.77	82.87	0.30	-3.52	-8.10
August	81.75	81.11	48.95	53.07	74.67	84.48	0.64	-4.12	-9.81
September	79.51	75.63	46.08	51.26	75.53	82.08	3.88	-5.18	-6.55
October	74.55	72.29	41.92	48.31	69.88	78.04	2.26	-6.39	-8.16
November	75.70	72.24	38.53	44.85	73.63	78.33	3.46	-6.32	-4.70
December	74.91	72.95	37.22	43.84	74.88	77.20	1.96	-6.62	-2.32
Year	80.54	79.27	42.73	49.33	72.68	79.99	1.27	-6.60	-7.31
1983									
January	76.59	72.88	39.89	45.38	73.88	80.21	3.7	-5.49	-6.33
February	78.12	75.11	44.80	50.22	77.00	82.66	3.01	-5.42	-5.66
March	79.15	78.51	47.85	51.94	79.85	84.84	0.64	-4.09	-4.99
April	84.55	83.42	48.58	53.03	79.64	84.26	1.13	-4.45	-4.62
May	83.31	82.96	49.67	52.81	77.58	83.09	0.35	-3.14	-5.51
June	82.59	81.20	50.74	52.07	77.44	79.78	1.39	-1.33	-2.34
July	78.22	76.68	49.19	50.70	74.03	74.10	1.54	-1.51	-0.07
August	76.15	75.58	46.79	48.89	72.58	72.26	0.57	-2.10	0.32
September	73.91	72.95	43.47	46.52	71.03	71.86	0.96	-3.05	-0.83
October[p]	74.13	73.40	41.50	46.11	73.41	74.16	0.73	-4.61	-0.75
November[e]	75.25	71.92	37.13	41.27	73.93	73.91	3.33	-4.14	0.02

[e]First 2 weeks
[p]preliminary

TABLE 11. SLAUGHTER STEER-FEED PRICE RATIOS, PRICE MARGINS BETWEEN SLAUGHTER AND FEEDER STEERS, PRIME INTEREST RATES, CANADA AND THE U.S.

	Steer-feed ratios[1]			Price margins[2] per cwt		Prime Interest rates	
	Ontario	Alberta	U.S.	Winnipeg	Omaha	Canada	U.S.
	-	no.	-	-Can $/cwt -	-U.S.$/cwt-	- percent -	
1982							
January	26.8	27.9	24.6	3.67	0.67	16.50	15.75
February	28.6	28.6	25.9	2.01	0.26	16.50	16.50
March	30.0	29.8	26.5	1.88	0.02	17.00	16.50
April	30.0	34.1	26.5	3.93	3.03	17.00	16.50
May	32.1	35.5	27.2	9.38	4.32	17.00	16.25
June	30.4	34.6	26.5	5.28	4.61	18.25	16.50
July	26.9	32.8	23.3	4.08	0.92	17.25	15.75
August	27.4	35.4	27.9	0.29	-2.71	16.00	13.50
September	26.2	35.5	27.7	-0.89	-5.23	15.00	13.25
October	33.9	37.1	27.7	0.33	-4.67	13.75	11.75
November	33.5	40.5	25.1	-1.15	-4.97	13.00	11.50
December	29.8	33.8	25.2	-3.51	-3.43	12.50	11.25
1983							
January	29.9	33.8	24.5	-4.67	-5.97	12.00	11.00
February	28.7	34.7	23.4	-6.58	-6.15	11.50	11.00
march	26.7	37.0	22.7	-8.02	-5.16	11.50	10.50
April	25.4	39.8	21.9	-2.05	-0.68	11.00	10.50
May	23.2	39.2	21.8	1.01	-0.11	11.00	10.50
June	21.3	38.0	21.2	-0.69	1.15	11.00	10.50
July	20.2	36.6	19.8[p]	-2.76	2.09	11.00	10.50
August	18.1	36.4	18.1[p]	-1.50	2.44[p]	11.00	11.00
September	17.9	31.8	17.8[p]	-2.60	1.53[p]	11.00	11.00
October	18.4	30.3	18.2[p]	-3.05[p]	-0.76[p]	11.00	11.00
November	18.8[p]	28.7[p]	17.9[p]	-4.48[p]	-1.99[p]		

p = Preliminary

[1]Ontario: number of bushels of No. 2 corn Chatham, equal in value to 100 lb of A1 and A2 steers Toronto; Alberta: number of bushels of open market barley equal in value to 100 lb of A1 and A2 steers Calgary; U.S. number of bushels of No. 2 yellow corn equivalent in value to 100 lb of choice steers live at Omaha.

[2]The price difference per hundredweight between A1 and A2 steers at Winnipeg (choice steers Omaha) and 272-318 kg (600-700 lb) feeder steers at Winnipeg 272-318 kg (600-700 lb) Kansas City.

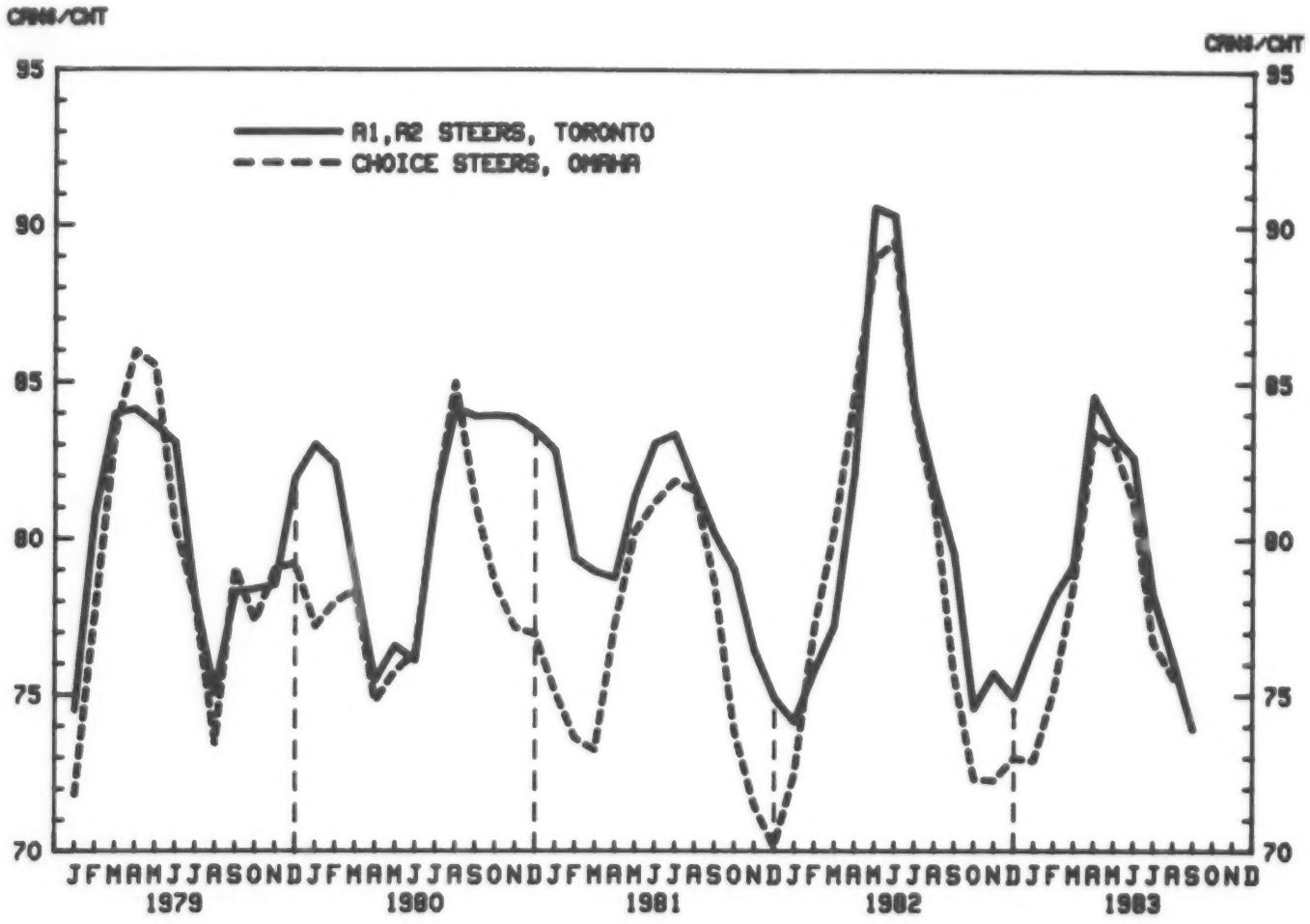
APPENDIX A: QUARTERLY FORECAST OF RED MEAT PRODUCTION AND PERCENTAGE CHANGE FROM YEAR-EARLIER LEVELS, CANADA AND THE UNITED STATES

	1983					1984		
	1st Q	2nd Q	3rd Q	4th Q[1]	Year[1]	1st Q	2nd Q	Year
U.S.								
Beef output ('000 t)	2 506	2 517	2 715	2 676	10 414	2 563	2 404	10 035
% change	+1	+3	+4	+1	+3	+2	-4	-4
Pork output ('000 t)	1 580	1 690	1 656	1 871	6 797	1 700	1 700	6 668
% change	-6	+5	+13	+13	+6	+8	+1	-2
Choice steers Omaha U.S. $/cwt	61.52	67.04	61.90	58-61	61-63	62-66	66-70	64-70
Barrows and gilts 7 mkts U.S. $/cwt live	55.00	46.74	46.95	40-43	46-48	42-46	45-49	48-51
CANADA								
Beef output ('000 t)	231.2	229.6	233.3	231.0	925.0	226.6	222.7	897.2
% change	+3	+5	+3	-1	+2	-2	-3	-3
Pork output ('000 t)	257.2	250.1	250.7	279.9	1 040	275.2	257.6	1 055
% change	-2	N/C	+9	+8	+4	+7	+3	+1
A1 and A2 steers Toronto Can $/cwt	77.95	83.48	76.09	75.50	78.25	77-81	80-84	80-85
Index 100 hogs Toronto Can $/cwt dressed	82.57	71.14	68.54	61.50	71.00	64-68	68-73	75-79

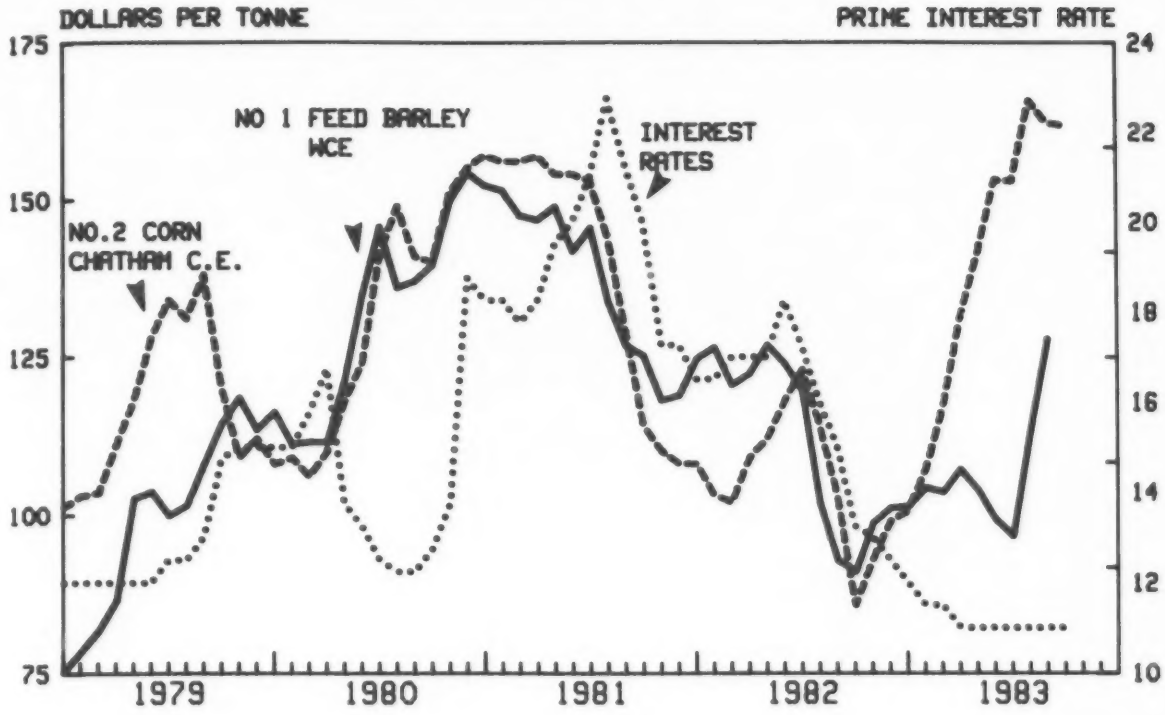
[1] Estimates

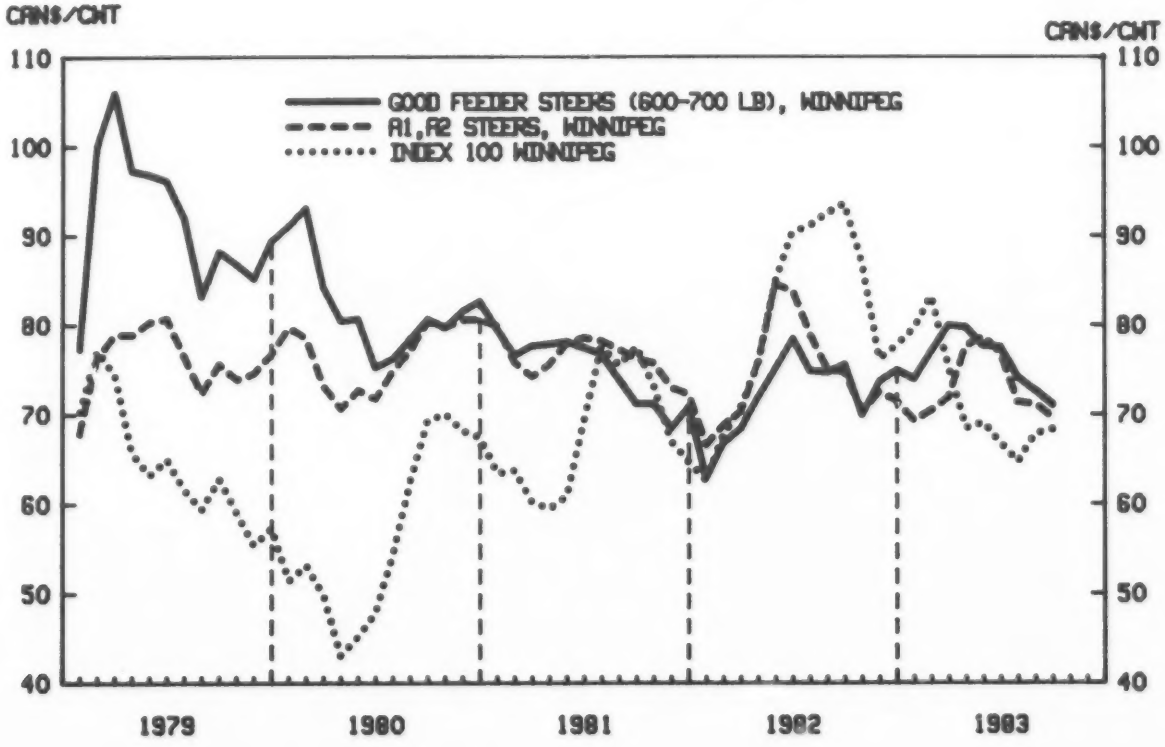
Sources: USDA Washington, Agriculture Canada, Ottawa

SLAUGHTER STEER PRICES, CANADA - UNITED STATES, 1979 TO 1983

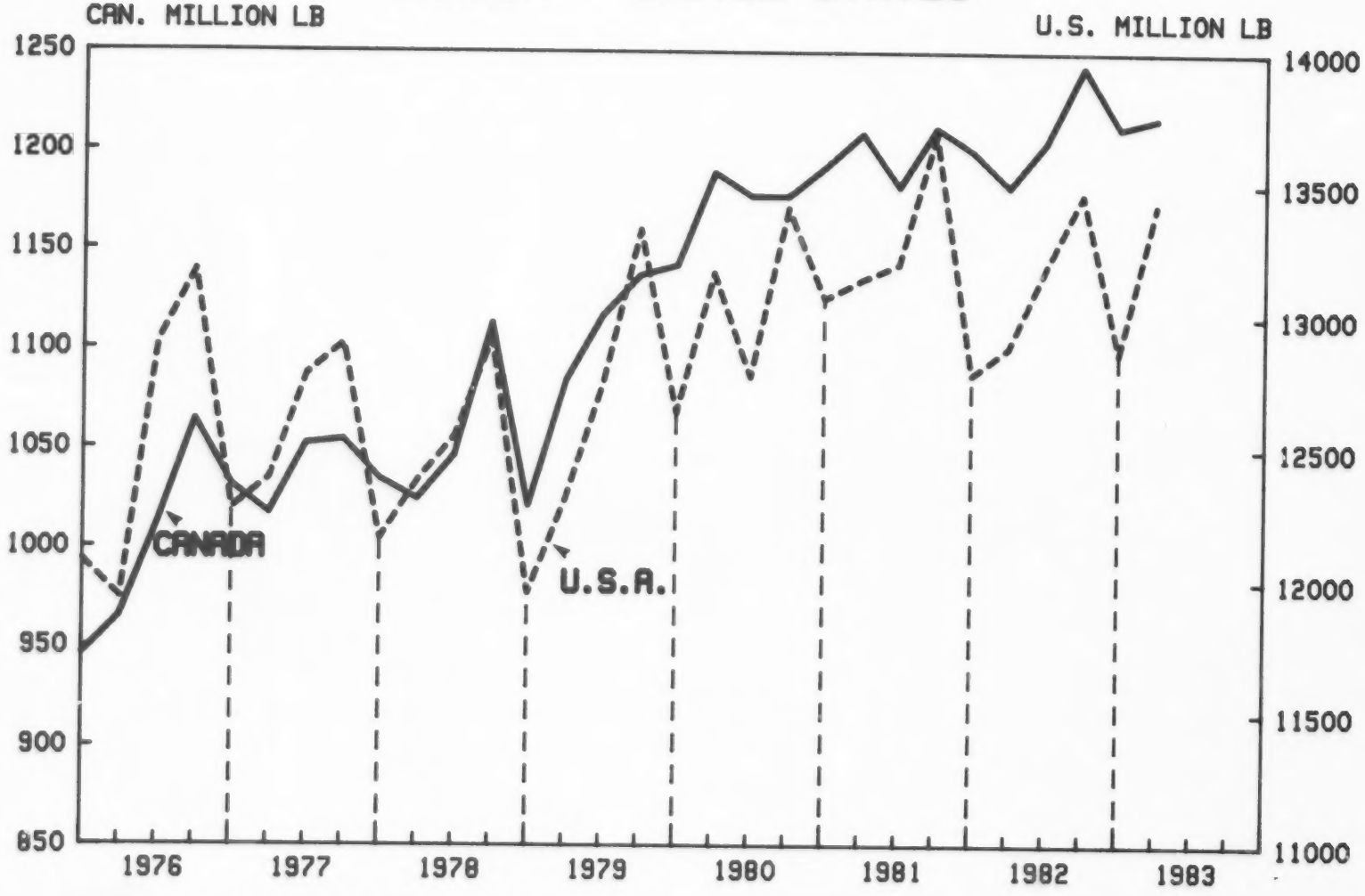


PRICES RECEIVED BY FARMERS, CANADA



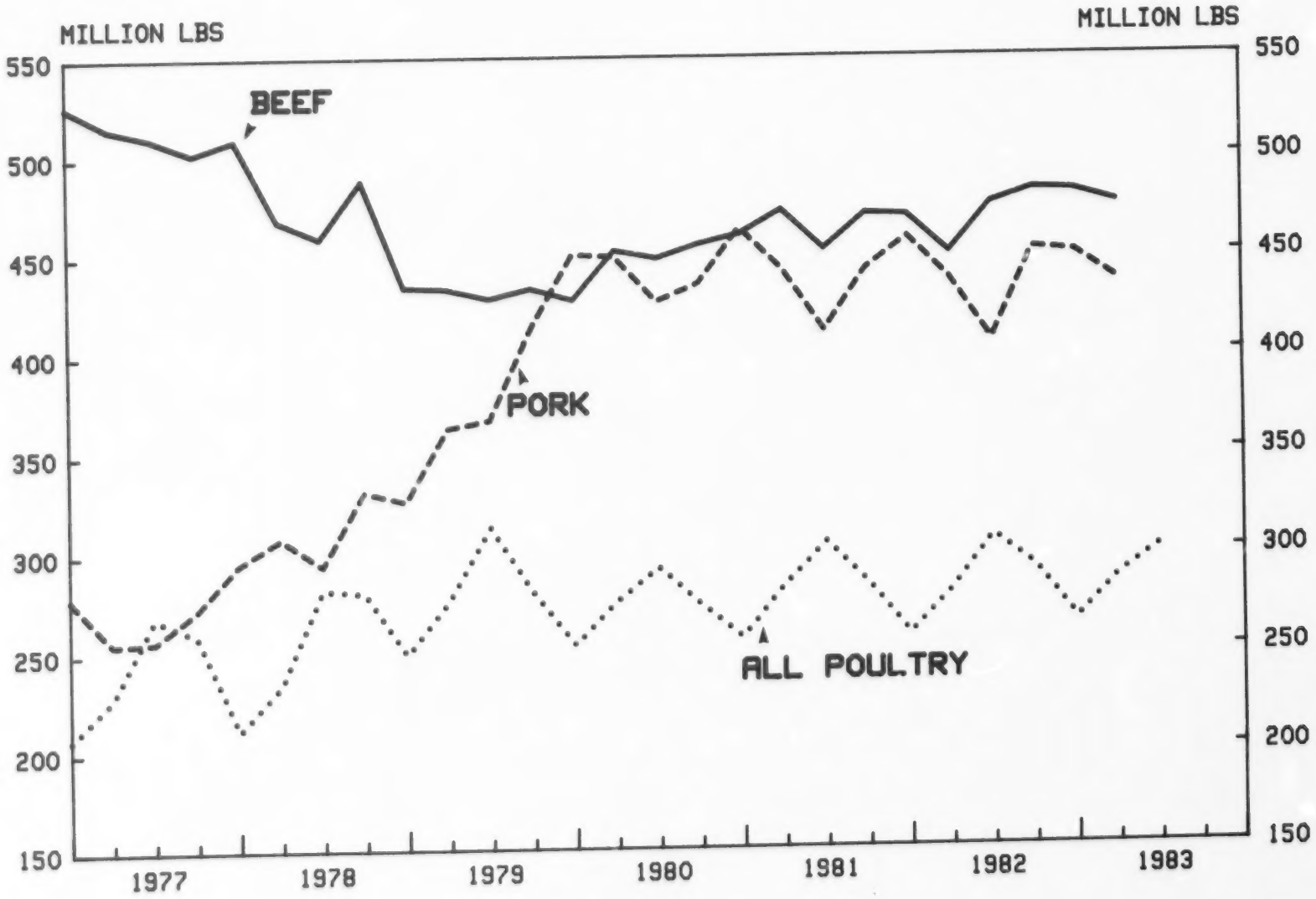


TOTAL MEAT OUTPUT (SLAUGHTERED)
CANADA - UNITED STATES



NOTE: TOTAL MEAT OUTPUT INCLUDES BEEF, VEAL, PORK, POULTRY, SHEEP & LAMB

CANADA: MEAT OUTPUT (COLD WEIGHT)



HOG SITUATION AND OUTLOOK

A. Boswell
J. Owen

HIGHLIGHTS

Following a relatively favorable year in 1982, the North American hog industry since the second quarter of 1983 was characterized by a sharp increase in pork output, declining hog prices and rising feed costs, which have led to a quick decline in enterprise returns. The cyclical expansion in pork output is expected to diminish by mid-1984 and to be followed by a marked improvement in returns the rest of the year and into 1985.

SITUATION

HOG PRICES DROP IN 1983

Against a background of large year-to-year increases in hog slaughter throughout Canada and the United States, together with record summer meat supplies, hog prices during 1983 dropped sharply from the winter period into the spring and summer months (Table 1). Canada's hog slaughter rose sharply in July and U.S. slaughter in May.

TABLE 1. PERCENTAGE CHANGE IN HOG SLAUGHTER FROM YEAR-EARLIER AND HOG PRICES

	Change in hog slaughter				Index 100 dressed		7 Markets Live
	West	East	Canada	U.S.	Alberta	Ontario	U.S.
	-	%		-	- Can $/cwt -		- U.S. $/cwt -
1982	- 5	N.C.	- 1	-10	82.23	83.32	55.44
1983							
January	- 8	17	9	- 7	81.97	83.71	56.78
February	-10	-	- 3	- 9	86.33	85.92	57.27
March	- 7	-11	-10	- 5	76.37	78.07	50.94
April	1	-	1	- 2	68.57	72.19	47.50
May	- 6	- 4	- 5	8	70.06	71.91	47.02
June	4	- 1	-	6	68.21	69.33	45.71
July	12	7	9	7	66.23	67.06	45.66
August	8	9	9	15	68.74	70.27	49.35
September	15	6	8	16	70.25	68.29	45.70
October[p]	18	5	8	20	63.58	61.75	41.56
November[a]	13	7	8	17	58.14	58.50	38.68
Jan.-Nov.	3	2	2	5	70.77	71.55	47.83

[a]First two weeks
[p]Preliminary

In 1983, Index 100 hog prices in Ontario reached an average monthly peak of nearly $86/cwt dressed in February, then dropped rapidly to about $67.00 in July, followed by a brief price rally in August in line with a stronger U.S. market of much lighter market weights. In September, hog prices weakened again in response to the normal fall increase in hog slaughter.

The relatively higher levels of hog slaughter in both Canada and the U.S. through the latter half of 1983 are the result of good financial returns to hog producers during 1982 and early 1983, which provided an incentive to expand the number of breeding swine rapidly in both countries. Following the 1983 winter period, declining hog prices and sharply rising feed costs have led to a quick decline in hog producers' profit levels.

RELATIVE STABILITY IN CANADA PORK SUPPLIES

The most significant feature of Canada's hog market in the last four years has been the relatively stable production. Since the all-time high of 1980, Canada's hog marketings have ranged close to the level of 13 million head per year and have reached a plateau in both eastern and western Canada. As of November 12 this year, national hog slaughter (gradings) was up 2% from the corresponding period the year before, with increases in the east and west of 2% and 3% respectively (Table 2).

More stable production in recent years reflects the rapid move everywhere in Canada to fewer but larger swine operations with high investment production systems. Increasingly, many farmers feel that the marginal income a small hog enterprise generates is not enough to justify the labor and expense. The 1951 census data showed that 58% of Canada's farms were raising swine, compared to about 20% in the 1981 census. However, fluctuations in Canada's hog production continue to be more pronounced in the grain growing areas of the Prairie provinces than in eastern Canada.

Following a sharp annual increase in U.S. inspected hog slaughter of 8% in 1980, slaughter dropped 4% in 1981 and another 10% in 1982. To mid-November this year, U.S. hog slaughter was up 5% from the same period in 1982. Geographically, U.S. hog production is a feed supply oriented enterprise, largely farm-based in the country's mid-west. The importance of corn for feed has tended to maintain this pattern.

RECORD HIGH 1983 MARKETINGS

In 1983, Canadian hog marketings (slaughter plus live exports) will reach an all-time high of nearly 13.7 million head, up over 3% from 1982, and 2% above the unprecedented 1980 high of 13.4 million head. For 1983, quarterly hog slaughter in Canada, compared to 1982, was down in the first and second quarters by 2.6 and 1% respectively but rose in the third quarter by 8.5% and is expected to increase by about

8% in the fourth quarter. This represents the largest quarterly increases in Canada's hog marketings in over two years and a general realignment with the U.S. hog cycle where output increased sharply, commencing in the second quarter of 1983. The Canadian weighted average price for market hogs in 1983 could average $10/cwt or more below the 1982 average of $84.94 but above the 1981 level of $71.24/cwt.

TABLE 2. PROVINCIAL HOG CARCASSES GRADED AND PERCENTAGE CHANGE FROM THE PREVIOUS YEAR

Region	Peak 1980		1981		1982		1983 Jan.-Nov. 12	
	mil.	%	mil.	%	mil.	%	mil.	%
Atlantic provinces	0.47	18	0.51	8	0.54	6	0.48	4
Quebec	4.69	23	4.74	1	4.60	- 3	3.91	-1
Ontario	4.19	11	4.06	- 3	4.19	3	3.76	5
Total east	9.35	17	9.31	-	9.34	-	8.15	2
Manitoba	1.17	11	1.17	-	1.13	- 3	1.04	5
Saskatchewan	0.74	15	0.65	-12	0.57	-13	0.50	1
Alberta	1.63	16	1.58	- 3	1.53	- 3	1.37	4
British Columbia	0.26	87	0.34	30	0.32	- 4	0.26	-7
Total west	3.80	17	3.74	- 2	3.55	- 5	3.17	3
Canada	13.15	17	13.05	- 1	12.89	- 1	11.32	2
Live exports	0.236	32	0.147	-38	0.305	107	0.273	81
Total marketings	13.39	18	13.19	- 1	13.19	N/C	11.60	3
United States[1]	91.88	8	87.85	- 4	79.33	-10	71.98	5

[1]Inspected

OUTLOOK

FACTORS AFFECTING SUPPLY OUTLOOK

On average, the relatively high profitability that characterized hog enterprises in both Canada and the United States from the fall of 1981 until the winter of 1983 largely disappeared during the balance of the year. Financial losses since the spring of 1983 are the result of both higher feed and supplement prices, which have forced production costs higher, and sharply lower market hog prices, which were caused

by the large expansion in hog inventory numbers in 1982 and subsequent pork supplies in 1983. This is evidenced by the 1983 quarterly movements of hogfeed price ratios (number of bushels of grain equal in monetary value to 100 pounds of live market hogs), which are a continued strong indication of the profitability levels of hog production; they have dropped to unfavorable levels during the last three quarters of the year (Table 10).

The price of corn in both the U.S. and eastern Canada rose sharply during the first nine months of 1983 followed by some price weakness in October. In western Canada, the price of off-Board barley remained relatively stable during the first seven months of 1983, followed by rising prices in August and September as it became more price competitive with corn for feeding. Given low fall hog prices, firm feed prices, and an unfavorable hog market outlook, the incentive to expand farrowings has rapidly disappeared through the latter part of 1983.

CANADA 1984: HIGH MARKETINGS LIKELY IN FIRST HALF, SECOND HALF LOWER

According to Statistics Canada's October 1, 1983 Pig Report, national pork supplies could remain relatively high through the first half of 1984. The total number of swine on Canadian farms as of October 1, 1983 was estimated at 10.3 million head, up 2% from a year earlier (Table 3). The number of pigs kept for breeding on October 1 was up 3% from a year ago.

Hog marketings in the first six months of 1984 will come largely from farrowings during the last half of 1983, which on October 1 were estimated by Statistics Canada to be about 4-5% larger than in the corresponding period of 1982. In the second half of 1984, hog marketings will be largely drawn from the first-half farrowings, which the October report does not survey.

While national hog production prospects are tentative, Canadian hog slaughter through the first half of 1984 may be expected to average above January-June 1983, probably in the range of 5% or more. A larger year-to-year increase may be expected in the first quarter of 1984, compared to the second quarter (see Appendix B). Providing that the unfavorable economic conditions in the hog industry which prevailed during the latter part of 1983 continue into early 1984, a cutback in hog marketings for the last half of the year from July-December 1983 appears likely, particularly in the fourth quarter. On balance, Canada's total hog marketings for 1984 are expected to be near the 1983 estimated level of 13.7 million head.

U.S. 1984 PORK OUTPUT EXPECTED TO PEAK IN FIRST HALF

U.S. inspected hog slaughter in 1983 may be expected to total about 83 million head, up about 5% from the 1982 total.

TABLE 3. CANADA: TOTAL NUMBERS OF SWINE ON FARMS AND PERCENT CHANGE FROM YEAR BEFORE

	July 1		October 1	
	1983	Change	1983	Change
	'000 head	%	'000 head	%
Newfoundland	19.1	-7	19.2	-3
Prince Edward Island	111.0	-2	117.5	5
Nova Scotia	148.0	2	151.5	5
New Brunswick	127.0	14	132.0	11
Quebec	3 150.0	-5	3 285.0	-3
Ontario	3 450.0	4	3 575.0	4
East	7 005.1	-	7 280.0	1
Manitoba	898.0	4	952.0	5
Saskatchewan	520.0	4	550.0	6
Alberta	1 180.0	3	1 241.0	3
British Columbia	254.0	-2	275.0	4
West	2 852.0	3	3 018.0	4
Canada	9 857.1	N/C	10 298.2	2
United States	45 250.0	10[a]	45 880.0	10[b]

[a]June 1, ten states
[b]September 1, ten states

Sources: Statistics Canada, USDA Washington

The USDA September Report on Hogs and Pigs on farms confirmed previous estimates of a large increase in farrowings during the first half of 1983. But it also indicated the cyclical expansion in hog production will likely be cut short by high feed costs and unsatisfactory hog returns since the spring of 1983. This could mean that increases in slaughter, when compared with a year ago, could slow by next summer.

The number of hogs on U.S. farms in 10 major hog producing states on September 1, 1983 was estimated by the USDA at 45.9 million head, 10% more than a year earlier. Breeding stock numbers as of September 1 were up 5% compared with a 9% increase noted in the June 1 report. For the first half of 1984, U.S. pork supplies will come largely from June-November 1983 farrowings, estimated on September 1 to be 7% more than those of a year earlier. Then, if hog producers follow through

with their intentions to reduce farrowings 1% in the December 1983-February 1984 period, hog slaughter in the early summer of 1984 should be about equal to that of 1983.

The USDA at their National Outlook Conference in early November projected pork output in the first and second quarters of 1984 to average 8% and 1% above 1983 quarters. U.S. marketing weights in early 1984 are expected to average below a year earlier, influenced by tighter feed supplies with higher prices. Output in the last half of 1984 was projected to average 6-8% below the year before, leaving commercial pork output for 1984 slightly below that of 1983.

HOG PRICES TO STRENGTHEN THROUGH 1984

Hog prices in North America dropped sharply during the last three quarters of 1983 in response to large increases in pork output and record total meat supplies in both Canada and the U.S. (Table 4). Pork supply projections and firm feed costs indicate continued low hog prices and poor profit conditions over the next several months, possibly extending to the spring or summer of 1984, followed by improved hog prices and enterprise returns for the balance of the year.

The declining level of pork supplies expected in North America during 1984 will be an important strengthening factor for hog prices. In addition, beef output in 1984 is expected to fall from 1983 levels in both Canada and the U.S. If economic recovery in North America continues into 1984, this could add some support to consumer demand for meat products. Another factor which could affect 1984 hog prices is the overall retail-to-farm price margins. In general, when hog slaughter is declining, the margin normally narrows, and vice versa. Moreover, hog prices, reflecting more market-level flexibility, can generally be expected to change proportionately more at the farm level than at the retail level, given an equal change in supply at the two market levels.

According to the USDA in early November, barrow and gilt prices at the 7 U.S. markets are expected to strengthen into 1984 and for the first quarter average in the U.S. $42-$46/cwt range live. Prices are expected to strengthen in the second quarter as hog slaughter slows on a year-over-year basis and to average $45-$49/cwt. Through the last half of 1984, U.S. hog prices are expected to average in the $51-$55 range. In 1984, U.S. hog prices may be expected to average $2/cwt or more above the 1983 estimate of $47.50/cwt live.

Canadian hog prices for 1984 will average above year-earlier levels, providing that the U.S. price forecast occurs and that no significant changes take place in the Canadian-U.S. exchange rates and assuming that Canadian hog prices remain on a full "export basis" with U.S. hog prices as they were in 1983. Index 100 hog prices in Ontario may be expected to strengthen through the first half of 1984 from the 1983

TABLE 4. QUARTERLY CHANGE IN PORK OUTPUT FROM YEAR-EARLIER, HOG PRICES, CONSUMER PRICE INDEX (CPI), AND TOTAL PERSONAL DISPOSABLE IN (PDI)

	Pork output		Index 100	Canada[a]		7 U.S. markets		U.S.[b]	
	Canada	U.S.	Ontario	CPI Pork	PDI	Barrows/Gilts dressed	live	CPI pork	PDI
	%		$/cwt	no.	1971 $ bil. $	Can $	U.S. $	no.	1972 $ bil. $
1982									
1 Q	-2	- 9	69.58	103.4	100.1	75.65	48.17	237.7	1039
2 Q	-2	- 9	86.86	113.3	98.7	91.33	56.46	250.3	1044
3 Q	-2	-10	95.24	125.0	98.7	100.60	61.99	270.2	1054
4 Q	+1	-12	84.08	123.9	97.9	88.16	55.12	274.1	1058
1983									
1 Q	-3	- 6	82.57	122.8	96.1	87.66	55.00	272.2	1064
2 Q	-1	+ 5	71.14	115.8	95.0	74.73	46.74	257.8	1070
3 Q	+8	+13	68.54	115.6	97.8	75.09	46.90	250.4	1076
4 Q	+8	+15	61.50			65.00	40.60		

[a]Consumer Price Index for pork (1981 = 100) and total real Personal Disposable Income (1971 $)
[b]Consumer Price Index for pork (1967 = 100) and total real Personal Disposable Income (1972 $)

fall average of approximately $61.50/cwt dressed. The 1984 first-quarter average may be expected to surpass the $65 level, then rise and average above $70 in the second quarter. Prices should move higher into the summer, probably exceeding the $80 mark, followed by seasonally weaker prices in the fall quarter, through the decline may be moderate. In 1984, Index 100 hogs in Ontario may be expected to average $4/cwt or more above the estimated 1983 average of $71.00 (Appendix A).

Canada's per-capita pork consumption for 1983 may be expected to average slightly above the 1982 level of 27.9 kg (61.5 lb). Canada's per capita pork consumption reached a peak of 31.3 kg (69 lb) in 1980 but dropped in 1981-82 because of sharply higher exports, lower imports and slightly lower levels of domestic pork output.

LONG RANGE OUTLOOK

The North American hog cycle remains an important factor for Canadian hog producers as they adjust production to perceived profitable alternatives. For many years, consecutive quarterly increases and

decreases in hog slaughtered compared to year-earlier levels have each averaged about 6-7 quarters. However, in 1974, with feed grains in tight supply and feed costs rising, hog slaughter in North America was up only 4 quarters. Conversely, in 1969 with feed grains in plentiful supply, slaughter was down for only 4 quarters.

While no two hog cycles are alike, the magnitude and economics of the cycle have changed significantly in recent years. The dramatic drop in pork output in both countries through the mid-1970s caused sharp increases in hog prices, which were further supported by declining beef output during the latter half of the decade. These high pork prices and relatively stable feed cost during the late 1970s encouraged a rapid expansion in swine breeding and hog production capacity levels.

Pork output in both Canada and the U.S. rose to record levels in 1980. Quarterly pork output in North America averaged above year-earlier levels from the second quarter of 1978 until the third quarter of 1980, a longer than normal expansion of 10-quarters (Table 5). During this period hog prices dropped, particularly through the last half of 1979 and the first half of 1980. This period of unfavorable hog enterprise returns was followed by a 10-quarter downturn in pork output, from the fourth quarter of 1980 until the first quarter of 1983. During this period hog prices increased, particularly in 1982.

The current expansion phase of the North American hog cycle, which commenced in the second quarter of 1983, is expected to last until the summer of 1984. This implies a shorter than normal expansion period of about 5 quarters, similar to 1974 when pork output was up for only 4 quarters.

Relatively high feed costs and unfavorable returns can be expected to bring a downturn in farrowings this winter and this pattern is likely to continue through most if not all of 1984. While the profit potential for hog producers look unfavorable for the first half of 1984, enterprise returns should show a marked improvement in the last half. A longer look ahead suggest 1985 could be a favorable year for hog producers.

CANADA: LOWER DRESSED EXPORTS OF PORK TO SEPTEMBER 1983

Official information from Statistics Canada as given in Table 6 shows that for the period January-September 1, 1983 dressed pork exports to all countries declined to 109 thousand tonnes, down 1% from year-earlier levels. Dressed exports to the U.S., at 75.2 thousand tonnes, were 3% above the year-earlier level but those to Japan declined 6% to 30.8 thousand tonnes. Exports of live swine at 319 thousand head, primarily for slaughter in the U.S. are sharply above January-September 1, 1982 levels by 84%. For the first eight months of 1983, the total export value of dressed pork ($317.1 million), pork offals

TABLE 5. QUARTERLY PERCENT CHANGE IN PORK OUTPUT FROM YEAR-EARLIER, HOG AND FEED PRICES

	North American Hog Slaughter			Hog Prices[a]		Canada Ave. farm barley price	U.S. Ave. farm corn price
	Can.	U.S.	Total	Can.	U.S.		
	- % change -			- $/cwt -		- Can$/bu -	- U.S.$/bu -
1978							
1Q	+ 3	- 2	- 1	69.28	47.44	1.69	2.06
Expansion							
2Q	+16	+ 2	+ 3	67.38	47.84	1.72	2.27
3Q	+10	+ 1	+ 2	67.29	48.52	1.54	2.05
4Q	+17	- 1	+ 1	74.36	50.05	1.64	2.03
1979							
1Q	+24	+ 3	+ 5	73.14	51.98	1.71	2.17
2Q	+19	+14	+15	64.97	43.04	2.12	2.37
3Q	+26	+19	+20	64.05	38.52	2.24	2.56
4Q	+26	+24	+24	56.92	36.39	2.51	2.35
1980							
1Q	+23	+21	+21	52.92	36.31	2.46	2.41
2Q	+24	+14	+15	49.55	31.18	2.67	2.42
3Q	+17	N.C.	+ 2	66.31	46.23	3.04	2.89
Reduction							
4Q	+ 6	- 2	- 1	71.92	46.44	3.22	3.09
1981							
1Q	+ 2	- 2	- 2	65.60	41.13	3.27	3.22
2Q	- 2	- 9	- 8	66.01	43.63	3.17	3.22
3Q	- 4	- 4	- 4	79.73	50.42	2.95	2.85
4Q	N.C.	- 2	- 2	70.39	42.63	2.63	2.39
1982							
1Q	- 2	- 8	- 7	69.58	48.17	2.70	2.48
2Q	- 2	- 8	- 7	86.86	56.46	2.71	2.57
3Q	- 2	-10	- 9	95.24	61.99	2.28	2.32
4Q	+ 1	-13	-11	84.08	55.12	2.11	2.12
1983							
1Q	- 3	- 7	- 6	82.57	55.00	2.24	2.54
Expansion							
2Q	- 1	+ 4	+ 3	71.14	46.74	2.25	3.00
3Q	+ 8	+13	+12	68.54	46.90	2.45	3.27
4Q	+ 8	+15	+14	60.50	41.50	2.92	3.30

[a]Canada Index 100 Ontario Can $/cwt dressed
U.S. Barrows and Gilts, 7 Markets, US $/cwt live

($22.0 million), sausages ($8 million), and live hogs ($51.3 million) accounted for $398.4 million, virtually unchanged from January-September 1, 1982.

For the year 1983, the total export value of Canadian pork may be expected to exceed the $500 million level. Exports in late 1983, however, came under pressure because of Denmark's reentry into the Japanese market as of September 1, 1983, and because of sharp increases in U.S. hog production.

U.S. PORK TRADE

While U.S. pork exports vary widely from year to year, pork imports have been generally increasing (Table 7). Exports of fresh and frozen pork continues to account for over 80% of total U.S. pork exports. Traditionally, processed pork (primarily canned hams and shoulders from Europe) was the major U.S. pork import category. During the early 1980s, however, U.S. imports of fresh or frozen pork, primarily from Canada, accounted for slightly more than one-half of total U.S. pork imports. During the first half of 1983, total U.S. pork exports were below year-earlier levels, while pork imports remained above those of a year ago.

PORK IMPORTS TO JAPAN

Through the past decade, annual hog slaughter in Japan has increased sharply, from around 11 million head in the early 1970s to nearly 20 million head in 1982. Through the early 1980s, however, pork output in Japan has remained relatively stable. Japan's pork production totaled 1427.6 thousand tonnes in 1982, up 2.3% from the 1980 level (Table 8). Through the first half of 1983, pork output was virtually the same as a year earlier, but overall is expected to show a slight year-to-year increase.

While pork imports to Japan have fluctuated widely during the past decade, they have generally been on the rise. Imports reached a record high in 1981, followed by a 23% decrease to 141 086 t in 1982. For the first half of 1983 Japan's pork imports totaled about the same as a year earlier.

Canada was the major exporter of pork to Japan in 1980, followed by the U.S. and Denmark. Denmark was the major supplier in 1981 but because of the outbreak of foot-and-mouth disease in March 1982, imports from Denmark were banned. The ban on pork imports from Denmark was lifted by Japan as of September 1, 1983. Since 1980, Japan's imports from "other" countries, in particular Sweden, Ireland and Finland, have increased.

TABLE 6. CANADA'S PORK TRADE (PRODUCT WEIGHT)

Trade	Average 1977-78	1979	1980	1981	1982	Jan.-Sept. 1 1983	Change
			'000 t				%
EXPORTS							
Dressed exports[1]							
U.S.	14.6	38.9	75.4	77.4	111.1	75.2	3
Japan	32.7	31.8	31.8	42.5	43.8	30.8	- 6
Others	1.6	6.3	8.1	6.8	6.1	3.1	-27
All countries	48.8	77.0	115.3	126.6	161.0	109.0	- 1
(mil. $)	146.6	225.8	280.7	357.9	494.7	317.1	- 6
Offal exports							
U.S.	13.6	21.6	24.7	26.7	26.8	19.1	9
Europe	8.9	9.3	16.3	18.6	17.1	9.8	-19
All countries	24.5	34.5	44.6	52.2	54.0	34.2	- 7
(mil. $)	128.5	22.0	27.4	34.1	38.8	22.0	-17
Sausage exports							
U.S.	1.4	2.0	1.8	1.8	2.0	1.4	10
All countries	2.9	3.1	2.6	2.6	2.7	1.8	1
(mil. $)	7.2	10.0	9.1	10.1	11.7	8.0	8
			'000 hd				
Live exports							
U.S.	113.4	129.6	235.9	144.1	302.8	316.8	+85
All countries	115.6	131.2	237.6	147.3	305.3	319.3	+84
(mil. $)	14.9	19.2	29.5	23.5	53.4	51.3	+72
All exports (mil. $)	181.6	227.0	346.7	425.6	598.6	398.4	- 1
IMPORTS							
			'000 t				
Dressed imports[1]							
U.S.	70.3	30.7	16.1	17.3	13.3	9.1	- 4
Others	1.5	1.6	0.6	1.2	0.3	0.6	140
All countries	71.8	32.3	16.7	18.5	13.6	9.7	N.C.
(mil. $)	140.4	40.0	39.5	48.0	44.3	28.2	- 8
			'000 hd				
Live imports							
U.S.	1.0	1.1	0.7	0.7	0.5	0.3	-16
All countries	1.2	1.3	0.8	0.9	0.5	0.4	- 2

[1]Includes fresh, frozen, cured and canned

Source: Trade of Canada, Statistics Canada

TABLE 7. UNITED STATES: TRADE IN DRESSED PORK (PRODUCT WEIGHT)

	Exports[1]			Imports		
	Fresh/ Frozen	Processed	Total	Fresh/ Frozen	Processed	Total
	t					
1975-79	98 877	11 398	110 275	22 497	127 276	149 773
1980	69 966	14 252	84 218	93 143	103 449	196 592
1981	86 652	14 234	100 886	98 226	97 533	195 759
1982	58 541	10 935	69 476	125 282	100 749	226 031
1st half 1983	33 167	4 275	37 442	60 635	66 985	127 620

[1]Excludes pork offals (variety meat) which during 1980 to 1982 averaged 57 000 Mt per year.

Source: USDA, Washington

TABLE 8. JAPAN: DOMESTIC PORK OUTPUT AND PORK IMPORTS

	1980	1981	1982	Jan.-June 1983
	000 t			
Pork output	1 475.0	1 395.8	1 427.6	685.5
% year ago	3.1	-5.4	2.3	N/C
Pork imports				
Canada	30 020	42 599	43 576	22 046
U.S.	29 747	39 134	32 755	21 119
Denmark	29 223	72 360	18 905	-
Taiwan	16 659	19 783	19 688	15 930
Others	2 509	9 753	26 162	22 378
Total	108 158	183 629	141 086	81 473
% year ago	-22	70	-23	N/C

Source: Meat Distribution Statistics, Ministry of Agriculture, Japan

TABLE 9. MONTHLY PERCENTAGE CHANGE IN HOG SLAUGHTER, HOG PRICES AND CONSUMER PRICE INDEX (CPI) FOR PORK, CANADA AND THE U.S.

	Slaughter change[1] from year ago		Canada			7 U.S. markets		
			Index 100		Pork[2] / CPI	Barrow & gilt		Pork[2] / CPI
	Can.	U.S.	Toronto	Edmonton	(1981=100)	Dressed	Live	(1967=100)
	%		Can $/cwt	dressed	no.	Can $	U.S. $	no.
1982								
Jan.	- 8	-11	65.70	62.36	101.5	70.66	45.63	234.7
Feb.	- 4	- 8	69.67	68.44	107.3	78.03	49.49	238.9
Mar.	- 4	- 4	73.38	71.88	101.5	78.26	49.38	239.5
Apr.	1	-10	78.88	75.68	103.9	82.84	52.08	241.6
May	-	-10	88.51	86.35	113.5	93.17	58.14	249.9
June	- 6	- 2	93.19	91.87	122.5	97.98	59.16	259.5
July	- 3	- 6	95.69	93.87	123.6	98.67	59.83	268.2
Aug.	- 3	- 6	95.69	93.87	123.6	102.08	63.13	268.2
Sept.	- 2	-14	96.41	96.77	127.5	101.04	63.01	277.1
Oct.	- 1	-17	89.89	90.19	128.4	90.95	56.94	277.9
Nov.	- 6	- 6	80.15	78.44	124.3	85.18	53.49	274.2
Dec.	- 3	-16	82.29	79.98	118.9	88.35	54.94	270.1
Year	- 1	-10	83.32	82.23	116.4	88.86	55.44	258.1
1983								
Jan.	9	- 7	83.71	81.97	120.5	90.58	56.78	272.0
Feb.	- 3	- 9	85.92	86.33	125.4	91.28	57.27	273.6
Mar.	-10	- 5	78.07	76.37	122.4	81.12	50.94	271.1
Apr.	1	- 2	72.19	68.57	116.5	76.01	47.50	262.1
May	- 5	8	71.91	70.06	116.2	75.04	47.02	257.3
June	-	6	69.33	68.21	114.6	73.15	45.71	254.1
July	9	7	67.06	66.23	116.9	73.08	45.66	251.2
Aug.	9	15	70.27	68.74	114.4	79.06	49.35	249.6
Sept.	8	16	68.29	70.25	115.4	73.14	45.70	250.4[p]
Oct.[p]	8		61.75	63.58		66.49	41.56	
Nov.[p]			58.50	58.14		62.00	38.68	

[1]Inspected slaughter on head basis, U.S. 1982 monthly data estimated by USDA
[2]Consumer Price Index for pork, Canada and the U.S., measure month-to-month percentage change in retail prices of pork
[p]preliminary

TABLE 10. HOG-FEED PRICE RATIOS (BUSHELS OF GRAIN EQUAL IN VALUE TO 100 POUNDS LIVE HOG)

Quarter of year	Ontario[a]			Alberta[b]			Omaha[c]		
	Hog price	Feed price	ratio	Hog price	Feed price	ratio	Hog price	Feed price	ratio
	Can $	¢/bu	no.	Can $	¢/bu	no.	U.S.$	¢/bu	no.
1979									
1st	56.32	260.7	21.6	57.69	136.3	42.3	51.74	213.7	24.2
2nd	50.03	302.5	16.5	50.05	152.3	32.9	42.60	241.7	17.6
3rd	47.01	341.2	13.8	47.75	168.7	28.3	38.10	250.0	15.2
4th	43.83	289.1	15.2	43.76	206.0	21.2	35.95	235.0	15.3
1980									
1st	40.75	274.3	14.9	40.98	224.7	18.2	36.22	226.7	16.0
2nd	38.15	297.6	12.8	34.67	230.7	15.0	30.72	241.5	12.7
3rd	51.06	365.1	14.0	48.04	270.0	17.8	46.02	293.6	15.7
4th	55.38	377.5	14.7	53.58	285.7	18.8	46.23	325.6	14.2
1981									
1st	50.51	397.5	12.7	47.60	295.0	16.1	41.05	320.7	12.8
2nd	50.82	393.5	12.9	48.67	299.7	16.2	43.28	323.0	13.4
3rd	61.39	360.7	17.0	59.48	281.7	21.1	50.10	281.8	17.8
4th	54.20	283.0	19.2	53.99	244.3	22.1	42.37	240.0	17.7
1982									
1st	53.58	266.3	20.1	52.02	245.7	21.2	47.89	246.7	19.4
2nd	66.88	284.3	23.5	65.17	244.0	26.7	55.97	263.7	21.2
3rd	73.33	305.0	24.0	72.19	221.7	32.6	61.37	233.3	26.3
4th	64.74	232.3	27.9	63.81	196.0	32.6	55.20	228.0	24.2
1983									
1st	63.58	275.0	23.1	62.80	194.3	32.3	54.78	262.0	20.9
2nd	54.78	360.0	15.2	53.09	188.0	28.2	46.86	310.0	15.1
3rd	52.78	407.0	13.0	52.67	193.3	27.2	47.08	331.7	14.2
Oct.[p]	47.55	400.0	11.9	48.96	235.0	20.8	41.56	328.0	12.7
Nov.[d]	45.04	395.5	11.4	44.77	241.5	18.5	39.02	322.5	12.1

[a] Index 100 Toronto, Can $/cwt live, No. 2 corn Chatham
[b] Index 100 Alberta, Can $/cwt live, open market barley, Edmonton
[c] Barrows and gilts, Omaha U.S.$/cwt live, No. 2 corn, Omaha
[d] first two weeks
[p] preliminary

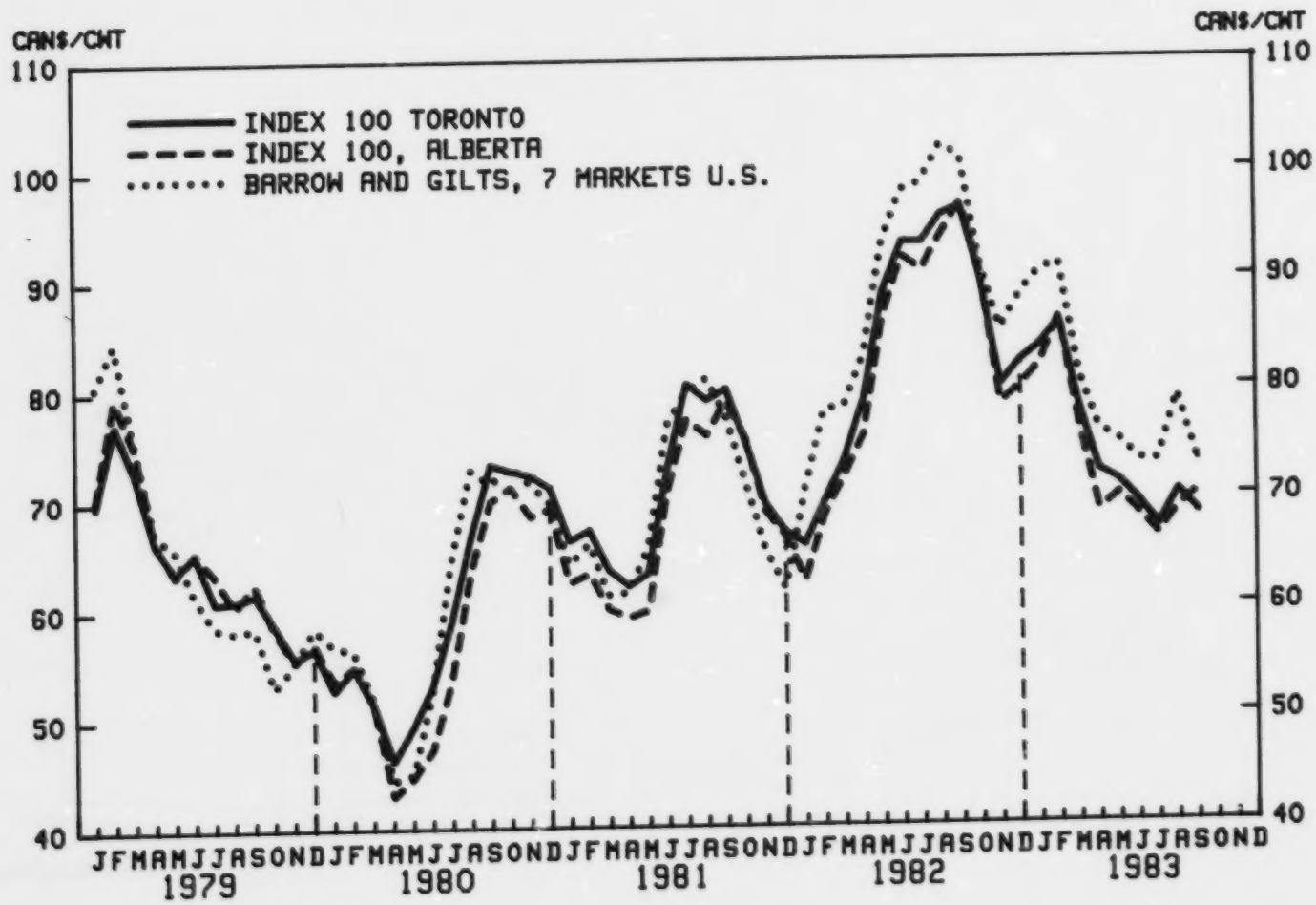
APPENDIX A. QUARTERLY FORECAST OF HOG MARKETINGS ('000 HEAD)

	Actual Oct.-Dec. 1982		Projected Oct.-Dec. 1983		Percentage change from year ago
	Total 3 months	Weekly average	Total 3 months	Weekly average	
Maritimes	136.5	9.8	148.8	11.4	9
Quebec	1197.3	85.5	1221.2	93.9	2
Ontario	1112.3	79.4	1201.3	92.4	8
Eastern Canada	2446.1	174.7	2571.3	197.8	5
Manitoba	263.6	18.8	321.6	24.7	22
Saskatchewan	136.5	9.8	154.2	11.9	13
Alberta	382.5	27.3	436.0	33.5	14
British Columbia	82.5	5.9	92.4	7.1	12
Western Canada	865.0	61.8	1004.2	77.2	16
Canada	3311.2	236.5	3575.5	275.0	8

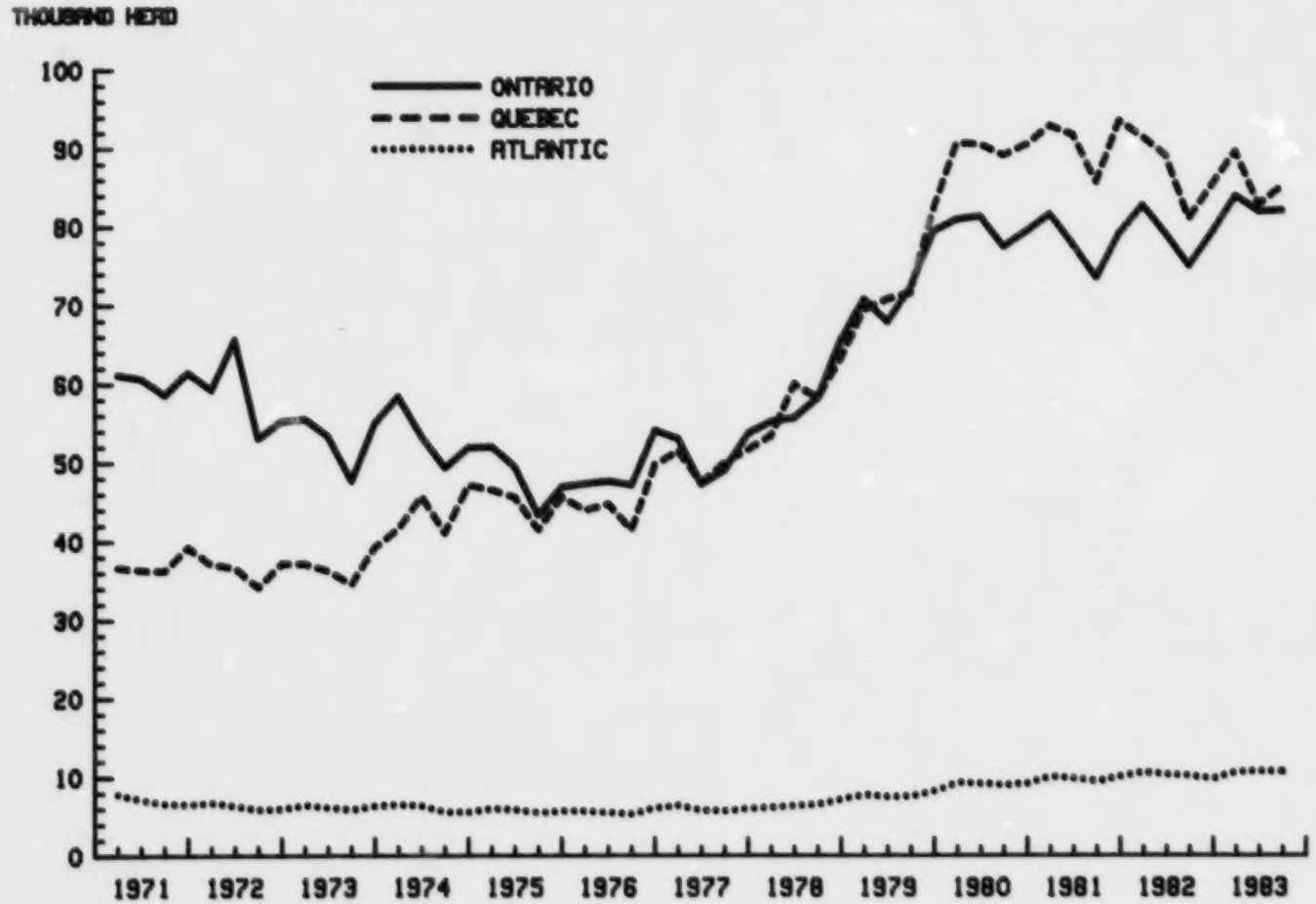
	Actual Jan.-Mar. 1983		Projected Jan.-Mar. 1984		Percentage change from year ago
	Total 3 months	Weekly average	Total 3 months	Weekly average	
Maritimes	138.0	10.6	149.0	11.4	8
Quebec	1166.9	89.8	1190.2	91.6	2
Ontario	1092.5	84.0	1169.0	89.9	7
Eastern Canada	2397.4	184.4	2508.2	192.8	5
Manitoba	278.1	21.4	314.3	24.2	13
Saskatchewan	137.2	10.6	150.9	11.6	10
Alberta	379.9	29.2	425.5	32.7	12
British Columbia	62.6	4.8	68.9	5.3	10
Western Canada	857.7	66.0	959.6	73.8	12
Canada	3255.1	250.4	3467.8	266.5	7

	Actual Apr.-Sept. 1983		Projected Apr.-Sept. 1984		Percentage change from year ago
	Total 6 months	Weekly average	Total 6 months	Weekly average	
Maritimes	278.6	10.7	287.0	11.0	3
Quebec	2187.3	84.1	2143.6	82.4	-2
Ontario	2135.9	82.2	2178.6	83.8	2
Eastern Canada	4601.8	177.0	4609.2	177.3	N/C
Manitoba	612.9	23.6	637.4	24.5	4
Saskatchewan	288.1	11.1	296.7	11.4	3
Alberta	791.8	30.5	831.4	32.0	5
British Columbia	156.6	6.0	164.4	6.3	5
Western Canada	1849.4	71.1	1929.9	74.2	4
Canada	6451.2	248.1	6539.1	251.5	1

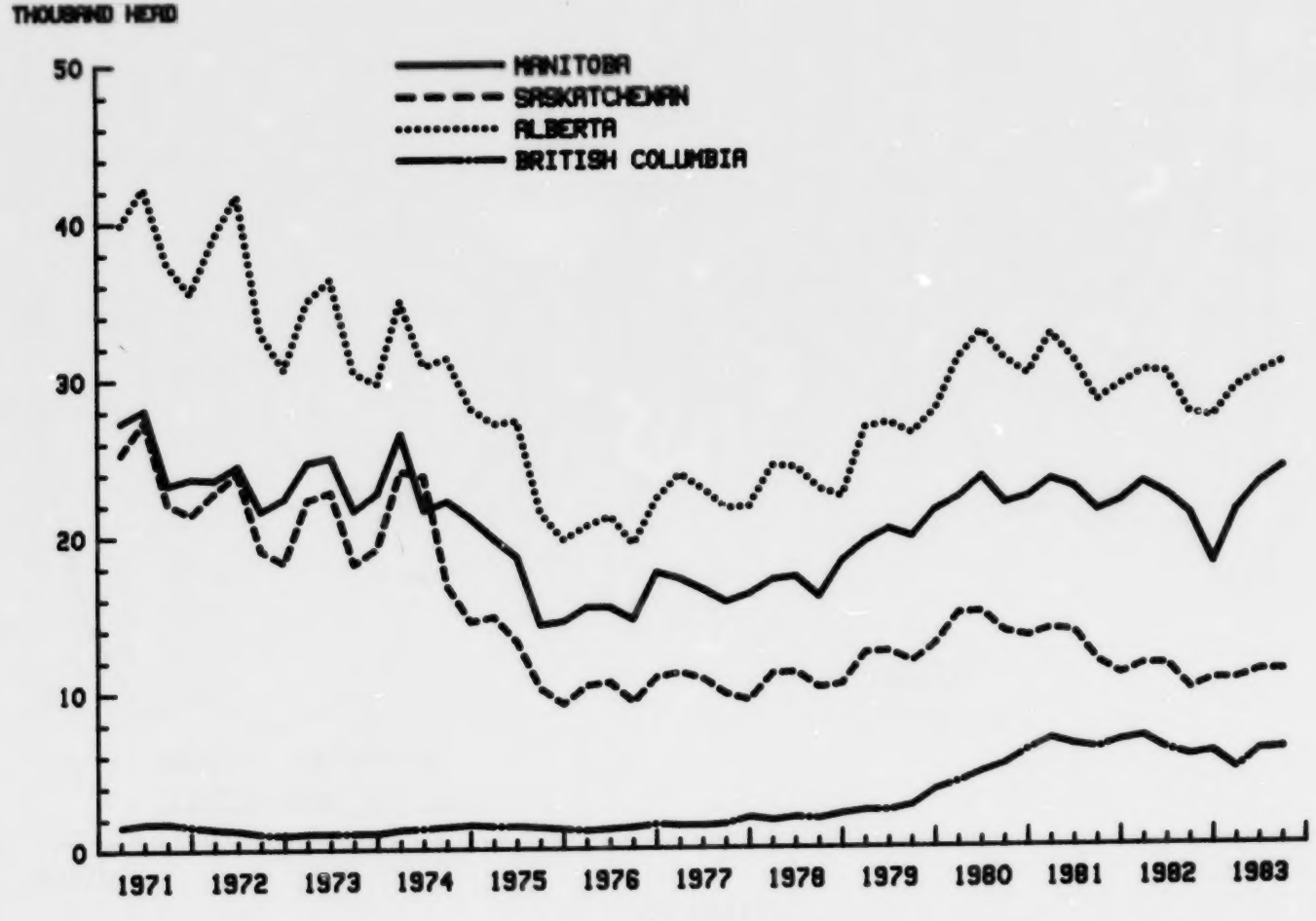
MARKET HOG PRICES, CANADA - UNITED STATES, 1979 TO 1983



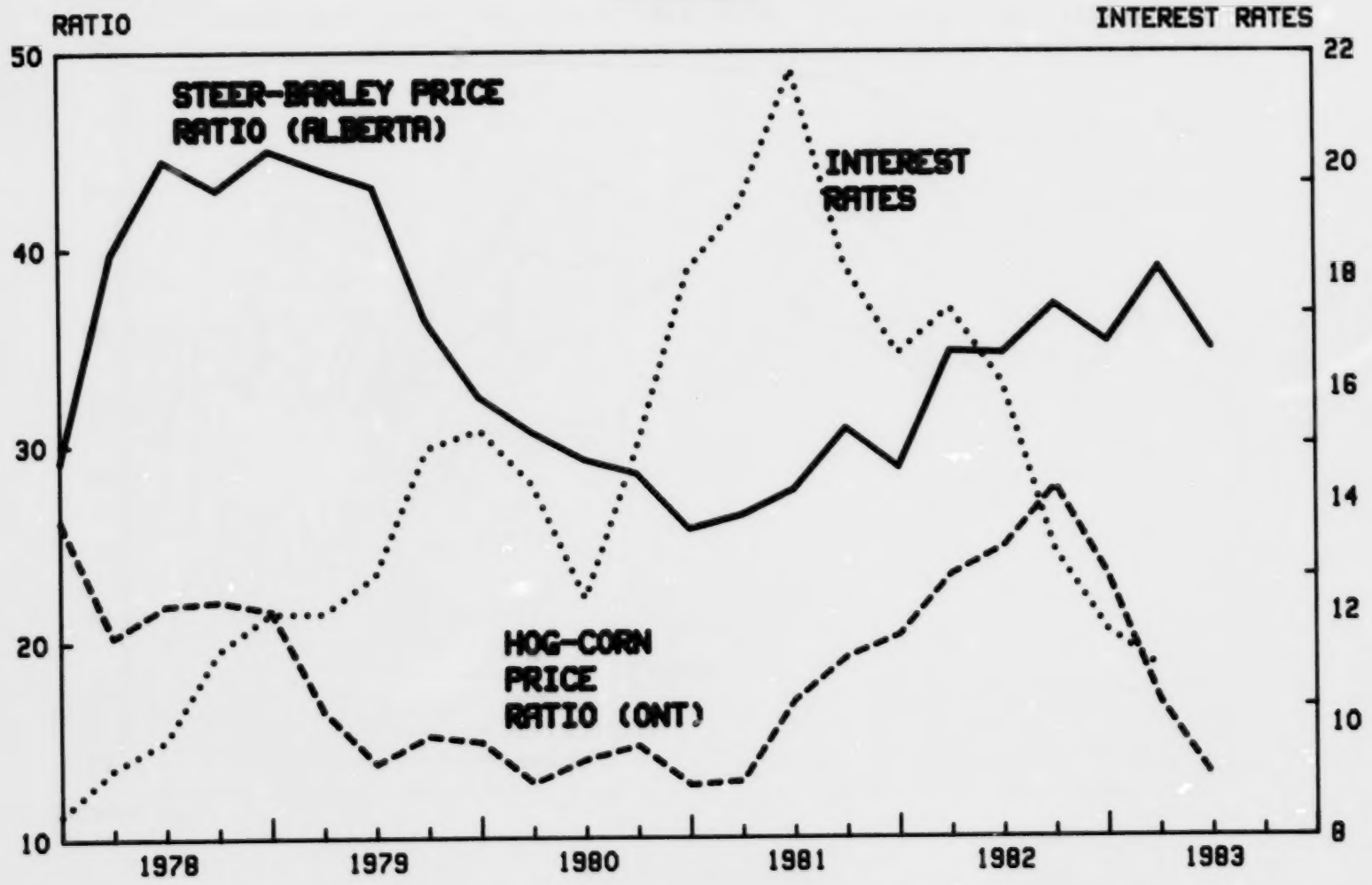
WEEKLY HOG GRADINGS IN EASTERN CANADA BY QUARTER, 1971 TO 1983



WEEKLY HOG GRADINGS IN WESTERN CANADA BY QUARTER, 1971 TO 1983



LIVESTOCK - FEED PRICE RATIOS AND INTEREST RATES
CANADA



SHEEP, LAMB AND WOOL

J. Owen

HIGHLIGHTS

Inspected sheep and lamb slaughterings in 1983 have continued to follow an upward trend that started in 1980 and should total over 10% higher than last year's level. In 1984, slaughterings from domestic origins are expected to be less than in 1983, since poor enterprise profitability has caused producers to cut back their flocks. The large supplies of beef and pork in 1983 have had a downward effect on slaughter lamb prices. However, by the last half of 1984 this situation could be reversed, causing slaughter lamb prices to move upward. Overall, 1984 slaughter lamb prices are expected to average above the 1983 level.

SITUATION

SLAUGHTER IN 1983 ABOVE YEAR-EARLIER LEVELS

Federally and provincially inspected sheep and lamb slaughter to November 12, 1983 was 230.2 thousand head, 18% above year earlier levels (Table 1). The major lamb producing provinces -- Alberta, Ontario and Quebec -- contributed to this national increase with provincial increases of 24%, 21% and 10% respectively over year earlier levels. These increases in slaughter are a continuation of a trend that began in 1980.

In addition to inspected slaughter is slaughter through other commercial channels, such as on-farm kill. In 1982 Statistics Canada estimated this other commercial slaughter at 188.4 thousand head or 48% of total commercial slaughter. Although a major marketing channel for many producers, it has diminished in importance over the last three years. This reflects in part the expanded distribution of inspected slaughter plants which handle sheep and lamb.

In the U.S. inspected slaughter from January to November 12 totaled 5.6 million head, up 3% from year-earlier levels (Table 1). As in Canada, this is a continuation of an upward trend which began in 1980.

FARM STRUCTURE

The farms producing these sheep and lamb for slaughter have become more specialized. According to the 1981 census of Agriculture, there are more sheep and lambs on fewer farms than have been recorded in the last two decades. In 1976 the average farm unit in Canada was 56 head per farm and by 1981 that size increased to 63 head per farm (Table 2). Provincially, the largest average sized sheep and lamb farms were in Alberta and Nova Scotia at 86 and 85 head per farm respectively.

TABLE 1. INSPECTED SHEEP AND LAMB SLAUGHTER AND PERCENTAGE FROM YEAR-EARLIER LEVELS

Region	1981		1982		Jan.-Nov. 12 1983	
	(000 hd)	(%)	(000 hd)	(%)	(000 hd)	(%)
Maritimes	4.0	48.1	6.4	60.4	6.4	22.0
Quebec	51.0	82.1	61.2	20.1	56.1	11.0
Ontario	76.0	12.8	71.4	-5.9	69.3	24.3
Eastern Canada	130.9	33.5	139.1	6.2	131.8	18.2
Manitoba	7.7	28.3	9.1	18.1	9.5	24.4
Saskatchewan	1.6	100.0	1.8	17.9	1.1	-26.5
Alberta	57.8	47.4	79.0	36.7	80.6	22.6
British Columbia	11.1	52.1	9.8	-11.0	7.2	-17.5
Western Canada	78.2	46.7	99.	27.8	98.4	17.6
Canada[1]	209.1	38.3	238.9	14.3	230.2	18.0
Commercial[2]	346.3	23.3	390.4	12.7	-	-
United States[3]	5 789.0	8.0	6 273.4	8.4	5 594.7	+3.0
Commercial[4]	6 008.0	8.0	6 448.7	7.3	-	-

[1]Slaughter in federaly and provincially inspected plants, Market Information Services, Agriculture Canada.
[2]Inspected plus uninspected slaughter, Statistics Canada, Livestock and Animal Products Statistics, Catalogue No. 23-203.
[3]Federally inspected slaughter, Market Information Services, Agriculture Canada.
[4]Inspected plus uninspected slaughter, USDA

LIVE IMPORTS CONTINUE TO TREND UPWARD

The large increase in inspected slaughter is due in part to increased imports of live lambs for immediate slaughter. Over the period 1970-1982 live imports have averaged about 25% of inspected slaughter. Imports of sheep and lamb to September 1, 1983 are 39.9 thousand head, up 27% from the 1982 level (Table 3).

Live exports of sheep and lamb from Canada totaled 4.5 thousand head, less than 1% of the January 1 inventories of total sheep and lambs on farms. This is, however, a 52% increase over the 1982 level.

TABLE 2. CANADA: SHEEP AND LAMBS ON FARMS, JULY 1, 1983

	Total sheep and lamb July 1, 1983		Average size of farm flocks June 1981	Percentage change 1981-1976
	('000 hd)	% of 1983/1982	(hd/farm)	(%)
Newfoundland	6.3	-22	47.1	+27
PEI	8.2	+ 9	54.4	+21
Nova Scotia	46.0	+ 5	85.0	+12
New Brunswick	11.5	- 6	59.7	+22
Quebec	128.0	+ 7	65.1	+33
Ontario	245.0	- 3	55.9	+31
East	445.0	N/C	60.0	+28
Manitoba	39.0	+ 3	60.8	+39
Saskatchewan	68.0	- 9	68.1	- 8
Alberta	197.0	- 4	86.3	+10
British Columbia	60.0	- 2	42.1	+14
West	364.0	- 4	68.0	+ 5
Canada	809.0	- 2	63.3	+13
U.S. (Jan. 1)	11 904.0	- 8		

TABLE 3. CANADA: LIVE TRADE IN SHEEP AND LAMBS

	Exports			Imports		
	U.S.	Others	Total	U.S.	Others	Total
1971	5 177	623	5 780	37 390	22	37 412
1972	13 888	675	14 563	44 002	15	44 016
1973	8 727	729	9 456	61 080	3	61 083
1974	1 703	869	2 572	32 364	11	32 375
1975	3 633	742	4 375	46 119	1 482	57 601
1976	4 335	790	5 125	65 249	1 558	66 807
1977	7 903	984	8 887	43 163	14	43 177
1978	9 927	1 200	11 127	23 023	741	28 764
1979	9 648	326	9 974	11 862	805	17 667
1980	19 125	1 742	20 867	21 390	424	21 878
1981	3 990	356	4 346	33 768	789	34 557
1982	6 217	308	6 525	42 738	-	42 738
Jan. 1 - Sept. 1						
1982	2 697	285	2 982	31 484	-	31 484
1983	4 471	52	4 523	39 960	-	39 960

Source: Trade of Canada, Statistics Canada, Ottawa.

DRESSED IMPORTS OF MUTTON AND LAMB UP SHARPLY IN 1983

Canada imports significant quantities of lamb and mutton to meet its domestic requirements. In 1982 imports of mutton and lamb for domestic consumption made up 52% of total supply (Table 4). Lamb imports, primarily from New Zealand from January to September 1, 1983, were 9.3 thousand tonnes, up from the 6.3 thousand tonnes imported by this time in 1982 (Table 5). The import value of lamb averaged $2.97/kg, the first decline in eight years. This reflects in part New Zealand's abundant supplies of lamb compared to last season. The New Zealand Meat Council and the Canadian Sheep Council have reached an agreement by which New Zealand will restrict its exports of fresh lamb to Canada until after Easter 1984. This is a continuation of an industry-to-industry agreement first made in 1981.

Mutton imports, primarily from Australia, have followed a similar trend as lamb -- larger quantities at lower prices. From January 1 to September 1, 1983 mutton imports were 1.8 thousand tonnes at $1.60/kg, up 251% over 1982. This increase can be attributed to Australia's large, drought-induced sheep and lamb slaughter that occurred during their 1982-83 season. Canadian levels of utility-grade beef and pork also effect the level of mutton imports. Therefore, during the remainder of 1983, large pork and beef supplies may temper any further increases in mutton imports.

TABLE 4. COMPOSITION OF TOTAL MUTTON AND LAMB SUPPLY 1978 TO 1982

	Domestic output		Imports for consumption		Total supply[1]
		% of total supply		% of total supply	
	'000 t	%	'000 t	%	'000 t
1978	4.8	20	16.5	69	23.8
1979	4.7	16	21.0	72	29.2
1980	5.2	23	13.8	61	22.7
1981	6.6	34	10.0	51	19.6
1982	7.8	38	10.5	52	20.3

[1]Domestic output of mutton and lamb plus imports minus exports (cold dressed weight).

Source: Livestock and Animal Products Statistics, Catalogue No. 23-203

SLAUGHTER LAMB PRICES DROP IN 1983

Because of the availability and level of sheep and lamb slaughter, the timing of Easter markets and the availability of other meats, Grade A,B slaughter lamb prices have averaged lower in 1983 than in 1982. In Toronto Grade A,B lambs 80-100 lb sold in the first quarter for an average price of $85.08/cwt, averaged slightly lower in the second quarter at $84.87/cwt and then dropped dramatically to average $70.41/cwt in the third quarter (Table 6). Also, monthly price variations have been greater in 1983 than in 1982, reflecting the more irregular marketings of sheep and lambs in 1983 compared to 1982. Average monthly price changes of about $25/cwt between March and April and between April and May demonstrate that the market is sensitive to irregular supplies during the season of strong consumer demand.

The retail price of frozen lamb and mutton, according to the Consumer Price Index compiled by Statistics Canada, reached its 3-year quarterly peak in the second quarter of this year and then declined in August to its lowest monthly level since 1980 (Table 7). This pattern of retail pricing may encourage consumer spending during the fall season when the consumer demand for lamb is usually lower.

OUTLOOK

PROFITABILITY CONTINUES TO DECLINE

Lower prices for slaughter lambs, combined with higher feed prices in 1983, have drastically eroded the profitability of lamb production for most producers in Canada. Profitability was poor in 1982 and producers reacted by reducing total inventories on farms by 2% as of January 1, 1983 and 2% as of July 1, 1983 compared to year-earlier levels (Table 2). Total inventories of sheep and lambs on Canadian farms July 1, 1983 totaled 809 thousand head. Similarly, in the U.S., inventories of total sheep and lambs on farm as of January 1, as estimated by the USDA, declined 8% relative to the year-earlier level (Table 2). These situations occurred with an 18% and 3% increase in slaughterings in Canada and the U.S. respectively, which suggests that breeding stock is not being held back.

In Canada, expectations are that producers will continue to reduce their flocks; this implies smaller supplies of slaughter lambs of domestic origin in 1984 than in 1983. The USDA forecasts that lamb and mutton supplies for 1983 will total 2% above the year-earlier level but for 1984 will decline sharply, totaling 11% below the 1983 total.

TABLE 5. CANADA: IMPORTS OF LAMB AND MUTTON (PRODUCT WEIGHT)

	Mutton imports			Lamb imports			Total mutton and lamb
	Australia	Total	Value	New Zealand	Total	Value	
	- 000 t	-	¢/kg	- 000 t	-	¢/kg	- 000 t -
1972	18.2	18.5	68.1	4.0	11.2	79.8	29.6
1973	12.9	13.9	130.7	4.9	8.8	142.6	21.8
1974	7.4	7.4	142.9	4.8	7.2	144.0	14.6
1975	8.4	8.4	73.4	6.4	8.6	119.7	17.0
1976	5.7	5.7	90.6	7.8	9.5	143.7	15.2
1977	2.5	2.5	98.7	8.3	10.2	163.4	12.7
1978	5.1	5.2	152.1	7.8	9.4	192.2	14.6
1979	6.8	7.2	168.0	9.2	11.2	257.1	18.5
1980	1.6	1.6	190.3	10.5	11.8	296.9	13.4
1981	0.7	0.7	227.1	8.0	9.1	327.4	9.8
1982	1.2	1.4	179.9	7.4	8.6	358.4	10.0
Jan. - Sept. 1							
1982	0.6	0.7	188.9	5.5	6.3	353.3	7.0
1983	1.0	1.8	160.5	8.6	9.3	310.0	11.1

Source: Trade of Canada, Statistics Canada, Ottawa.

TABLE 6. AVERAGE PRICES OF GRADE A AND B LAMBS (80-100 LB) TORONTO, AND CHOICE LAMBS, SAN ANGELO, TEXAS

Month	Slaughter lambs, Toronto			Slaughter lambs, San Angelo		
	1981	1982	1983	1981	1982	1983
	-		Can $/cwt			-
January	75.67	76.74	75.07	68.45	61.41	68.56
February	76.01	79.47	87.76	69.10	64.95	74.72
March	78.82	80.86	92.42	67.67	74.08	77.62
April	83.00	82.87	72.04	75.18	81.50	81.02
May	80.54	87.28	101.49	78.43	82.82	74.49
June	89.27	85.42	81.09	81.58	80.76	69.77
July	85.51	84.97	73.89	77.63	73.02	62.54
August	75.91	72.19	67.95	75.69	68.17	63.28
September	73.49	70.25	69.40	62.88	65.32	62.70
October	69.43	69.26	75.12[p]	64.42	61.96	67.06[p]
November	67.95	69.52	76.75[a]	57.89	58.24	70.05[p]
December	69.26	70.04		-	63.92	
Year	74.76	74.34		70.81	69.68	

p = preliminary

[a]first two weeks.

Source: Agriculture Canada, Ottawa and USDA Washington.

TABLE 7. CONSUMER PRICE INDEX FOR MUTTON AND LAMB (1971 = 100)

	1981	1982	1983
1st Quarter	277.7	257.6	272.2
2nd Quarter	208.3	279.6	284.6
3rd Quarter	267.5	269.0	(July) 253.6
4th Quarter	250.9	255.8	(Aug.) 240.7

LAMB PRICES TO RISE IN 1984

In 1983, the general price trend for slaughter sheep and lambs in Canada followed the general price trends of slaughter steers and hogs (Table 8). Prices in the fourth quarter are expected to average in the mid-70s/cwt compared to $69.60/cwt in 1982. For the year, lamb prices in Toronto are forecast to average around $77-80/cwt, up from $74/cwt in 1982. Lamb prices are expected to improve in 1984 as prices strengthen throughout the red meat sector, especially in the second half of 1984. As well, expectations for increased consumer expenditures on at-home food will have a positive effect on these prices.

TABLE 8. QUARTER PATTERN OF LIVESTOCK PRICES AT TORONTO

	Slaughter lambs		Slaughter steers		Slaughter hogs	
	Grade A,B	Quarterly change	Grade A,B	Quarterly change	Index 100	Quarterly change
	($/cwt live)	(%)	($/cwt live)	(%)	($/cwt dressed)	(%)
1983						
1st Quarter	85.08	9	77.95	2	85.57	- 1
2nd Quarter	84.87	N/C	83.40	7	71.14	-14
3rd Quarter	70.35	-17	75.49	-10	68.54	- 4
4th Quarter	mid 70's		74.00	- 3	61.50	- 9
Year	77-80		77.90		70.93	
1984	78-84	+1-5	79-84	+1-7	74-79	+4-11

CANADA'S WOOL SITUATION

Statistics Canada has estimated that shorn wool production for 1983 is 1380 t, down from 1982 levels of 1417 t. Producers reported a 4% decline in western Canada and a 1% decline in eastern Canada in the amount of wool they had sheared or anticipated sheering (Table 9). Wool produced in Canada is marketed primarily through three channels: 1) the Canadian Wool Growers Cooperative; 2) directly to the wool millers; or 3) used on the farm (in cottage industries). The majority of Canadian wool is sold through the Canadian Wool Growers Cooperative, and most of this wool finds its way to the world market.

Although Canada exports most of the wool it produces, domestic requirements for wool are met primarily by imports. These imports primarily consist of non-greasy wool from Australia, New Zealand, United Kingdom, South Africa and the United States. In 1982 the total domestic disappearance of wool was 11.1 thousand tonnes, of which 10.5 thousand tonnes were imported (95%).

Canadian wool prices, as estimated by Statistics Canada, have trended downward since 1980. In 1982, the weighted average price was $135/kg, 5% below 1981 and 15% below 1980 prices.

TABLE 9. SHORN WOOL PRODUCTION BY PROVINCE 1982 AND 1983

	1982	1983	1983/1982
	- t -		- % -
Newfoundland	7.0	5.4	-13
Prince Edward Island	9.1	11.5	26
Nova Scotia	53.9	52.2	- 3
New Brunswick	16.6	17.4	5
Quebec	198.0	210.6	6
Ontario	427.2	404.8	- 5
East	711.8	701.9	- 1
Manitoba	61.4	67.6	10
Saskatchewan	134.4	120.1	-11
Alberta	415.1	401.7	- 3
British Columbia	94.3	88.8	- 6
West	705.2	678.2	- 4
Canada	1417.0	1380.1	- 3

WORLD WOOL PRODUCTION DECLINES MARGINALLY

World wool production in 1982-83 is expected to show a decline from the previous record level of wool production set in 1981-82. However, carryover stocks will offset this marginal decline to put world wool availability at a 7-year record high. The International Wool Textile Organization estimated in 1982-83 that world wool production (greasy) was 2870 thousand tonnes. This is still 2% above the previous 4-year average. This situation resulted from the increased wool production of New Zealand, China, Uruguay, Argentina and Pakistan offsetting the declines in Australia and the Soviet Union, the two largest producers. Total wool available for world trade was estimated at 1781 thousand tonnes (clean), 2% more than in 1981-82. Carryover stocks were 36% larger than in the previous season due to weather-related increases in Australia and New Zealand as well as increases in Argentina as a result of market interuptions caused by the war in the South Atlantic. The increases were most significant for the crossbred and carpet-type wools.

World demand for wool in 1982 showed its first decline since 1977. The upward trend, which had been spurred primarily by strong Soviet Union and Chinese demand, was tempered as the recession caused free market economies to decrease substantially their demand for wool. Future world demand for wool will depend upon increased demand from the Soviet Union and China and a strong recovery in the wool textile industry. The factors that will bring the textile industry out of the recession are increased consumer spending on woollen goods, low interest costs, more stable currency values and a good availability of foreign exchange for most East European countries. Competition from other petroleum-based fibres could soften world demand for wool. Surplus petroleum supplies have reduced production cost.

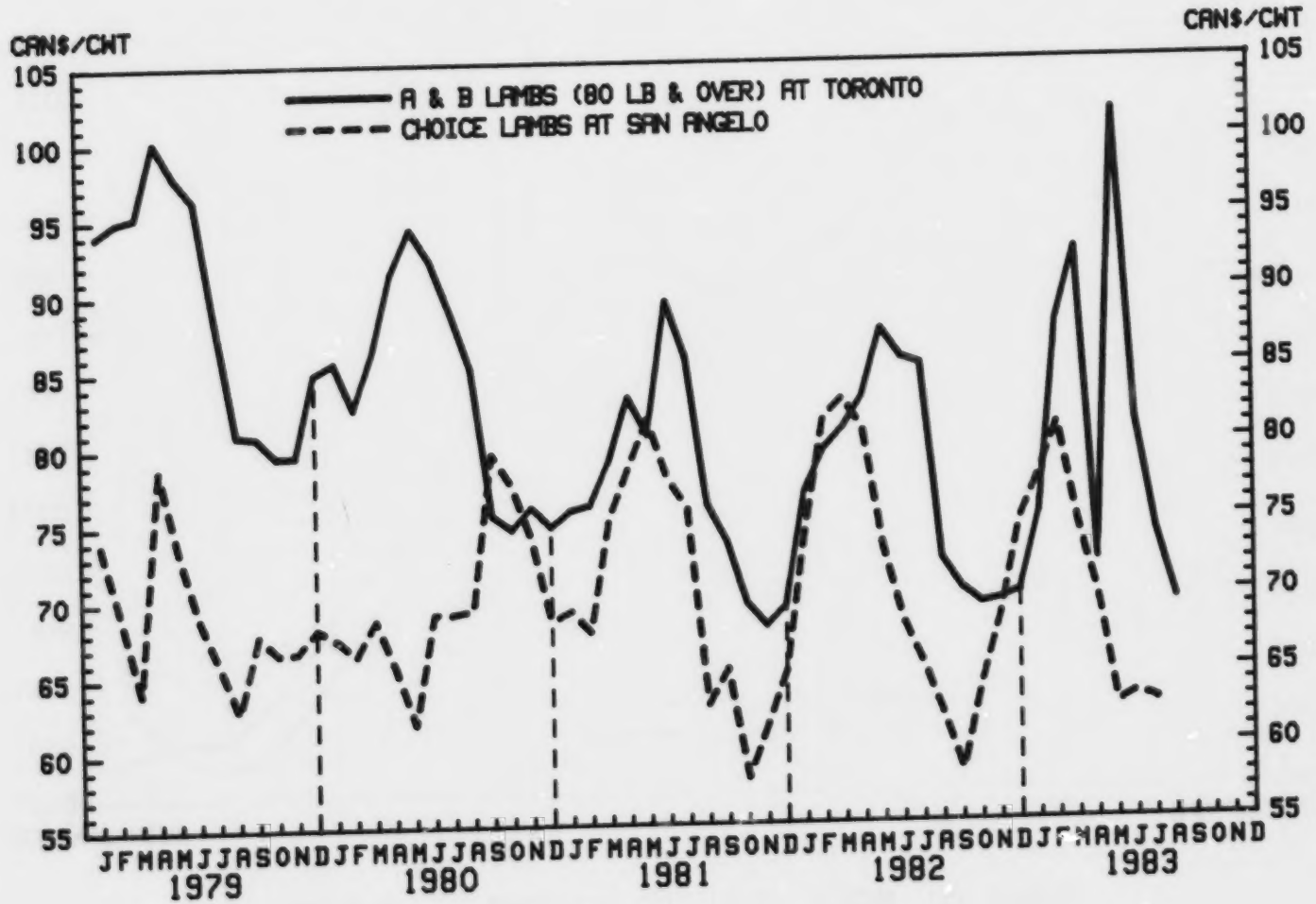
In Canada, expectations call for an improved wool demand resulting from lower interest rates. However, expectations for increased consumer spending are greater for durable goods rather than for non-durables such as woollen products. Housing starts, which are expected to increase slightly in 1984, could have a positive effect on the demand for carpet-type or cross-bred wools. Although the Canadian outlook for wool production in 1984 is poor due to declining sheep and lamb inventories and enterprise profits, world wool supplies are expected to be ample. World production of wool in 1983-84 is expected to be 2% below the 1982-83 level, primarily due to Australia's herd rebuilding, while carryover stocks will remain large.

TABLE 10. CANADA: WOOL PRODUCTION, EXPORTS, IMPORTS AND DISAPPEARANCE

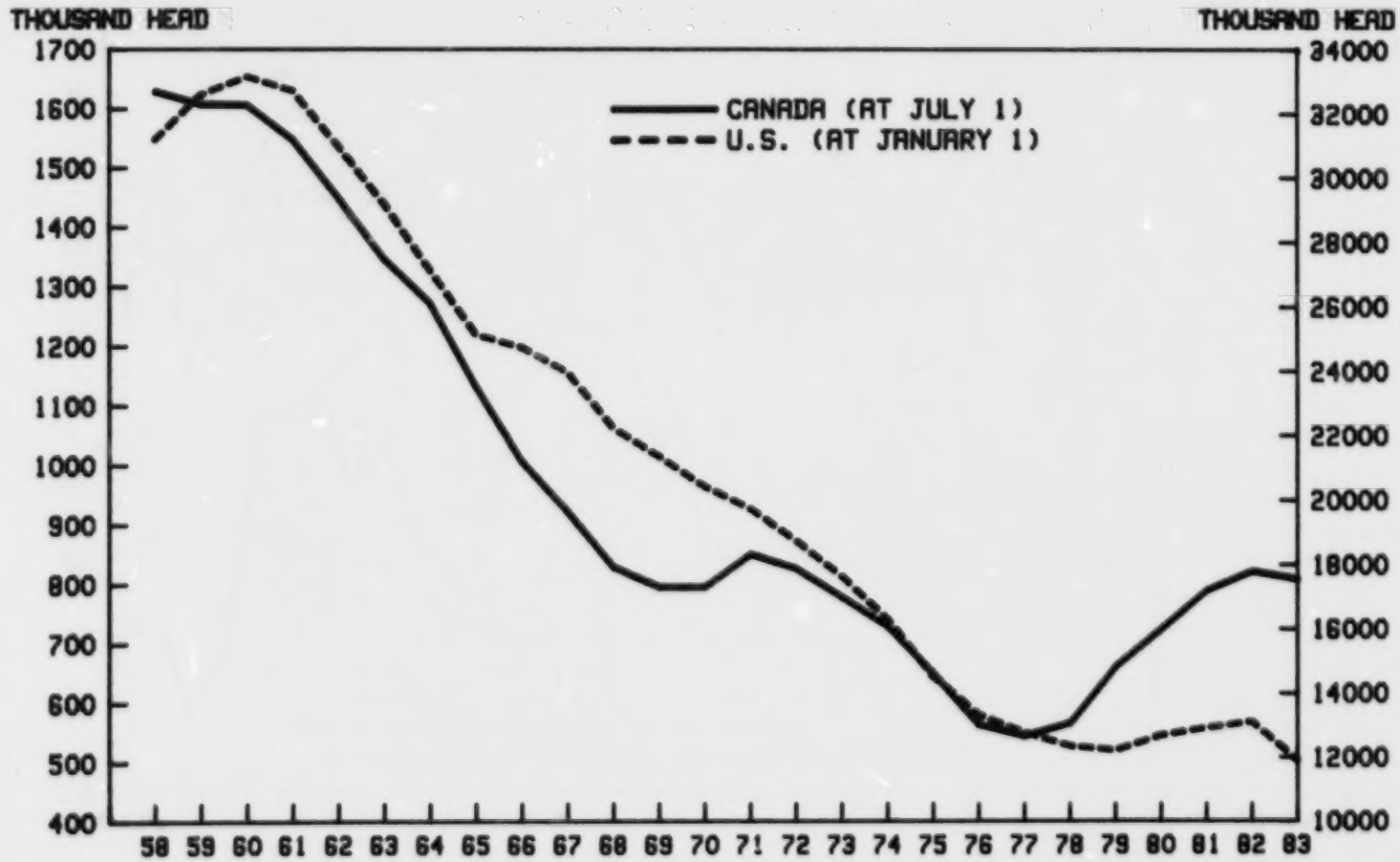
Year	Domestic production	Exports	Imports	Domestic disappearance
	-		t	-
1972	1 574	929	19 804	20 449
1973	1 482	711	15 567	16 338
1974	1 410	518	12 203	13 095
1975	1 266	1 019	14 326	14 573
1976	1 073	449	16 519	17 143
1977	925	410	16 022	16 537
1978	925	517	17 396	17 804
1979	1 066	330	18 771	19 507
1980	1 173	459	14 675	15 389
1981	1 407	696	14 040	14 751
1982	1 417	799	10 458	11 076
1983 (Sept. 1)	1 380	675	4 765	5 032

Source: Livestock and Animal Products Statistics, Cat. No. 23-203, Statistics Canada

SLAUGHTER LAMB PRICES (LIVE), MONTHLY, 1979 TO 1983



SHEEP AND LAMBS ON FARMS
CANADA - UNITED STATES, 1958 TO 1983



POULTRY AND EGGS

HIGHLIGHTS

Low level of frozen storage stocks and a conservative quota will mean a lower supply of chicken for Canadian consumers during the fourth quarter of 1983. However, more plentiful supplies and falling retail prices are expected in early 1984. It is unlikely that prices to producers for chicken will show much change until mid-summer, when falling feed grain prices reduce the costs of producing poultry meat.

Adequate supplies of heavy weight birds will highlight the Christmas turkey market this year. This should increase total consumption, as consumers will be able to purchase heavier turkeys. A 1984 quota of 89.1 Mkg will likely lead to a tight turkey market next year, especially during the Thanksgiving-Christmas season, when red meat market conditions are expected to improve the demand for poultry meat.

The Canadian Egg Marketing Agency has cut quota 5% effective January 1, 1984 to deal with the mounting costs of buying and reselling surplus eggs. In 1983, higher production, combined with a no-growth situation in consumption, has increased by over 40% the number of eggs declared surplus to the table market. Egg prices at the producer, wholesale and retail levels are expected to remain relatively stable until late spring-early summer, when a drop in the cost of production due to lower feed prices should bring price reductions at all levels.

CHICKEN

Susie Miller

SITUATION

Domestic chicken production during the first three quarters of 1983 was 284.1 Mkg, a 1% increase over the corresponding period in 1982. This additional production occurred during the first half of the year, and first half production was up almost 3%. Third quarter quota was set by the Canadian Chicken Marketing Agency (CCMA) at about 2.6% below third quarter 1982 production, perhaps in anticipation of illegal marketings during this period. Third quarter production was further cut back by several provinces, notably Ontario, to ensure that 1983 annual production would comply with 1983 annual allocation.

Frozen storage stocks have continued the declining trend which began in early 1982. Aggressive marketing by the processors during the first half of 1983 resulted in a drawdown of frozen inventories. Opening stocks for the third quarter of 1983 were 10.3 Mkg, 28.5% below July 1, 1982 levels. A decision by Alberta food chains to move to a fresh retail market have reduced the requirements for frozen chicken, and conservative production quotas for the last half of 1983 have continued to push down stocks. Stocks as of October 1, 1983, were 7.551 Mkg, 36% below October 1, 1982 levels, and 27% below the last 10-year October 1 average of 10.2 Mkg.

Producer prices remained below 1982 prices during the first half of 1983 due to low feed costs and a softer market resulting from more abundant supplies of fresh chicken. However, escalating coarse grain prices led to an accelerating cost of production during the third quarter, which created higher producer prices, strengthened by a tighter supply of chicken. The minimum quoted price in Ontario for live broiler chicken (under 2.3 kg) averaged $1.107/kg during the July-September 1983 period compared to $1.08 for the same period last year, an increase of 2.5%. A number of Ontario producers have received more than the quoted minimum price in the form of premiums or other concessions.

Total supplies of fresh and frozen chicken (excluding imports) were more than 6 Mkg or 6% below 1982 levels. Toronto wholesale market quotations reflected more accurately this tighter third quarter supply, with the weighted average price to retailers for fresh Grade A ice pack whole chicken (eviscerated basis) at $2.231/kg for the third quarter 1983, up almost 10% compared to $2.031/kg during the same period last year. Imports of live and processed chicken and chicken products were up 1 Mkg (12%) from 1982, as additional supplies of live product were required to supplement domestic production during the third quarter of 1983.

Domestic consumption of chicken rose during the first half of the year, up 8% from the first half of 1982, to reach a record level for Canada. The consumption increase resulted from the combination of favorable retail chicken prices and relatively higher red meat prices. This increase has been moderated somewhat by stagnant third quarter consumption, as chicken prices increased and pork prices moderated. To October 1, 1983 apparent disappearance is 2.2% higher than last year.

OUTLOOK

Domestic production of chicken during the fourth quarter of 1983 may be about 92 Mkg. Low October 1 inventories, combined with domestic production below fourth quarter last year, will mean total supplies of chicken about 6% lower than fourth quarter 1982. This should keep wholesale prices at a level which will discourage retail specialing, and, combined with reduced pork prices and seasonal consumption patterns, will likely significantly reduce fourth quarter Canadian disappearance below the corresponding quarter of 1982.

The 1984 annual quota has been set at 384.8 Mkg, 2.9% above 1983, with first quarter allocation at 94.9 Mkg. With the eastern Ontario illegal production problem under control, chicken producers in Canada should be able to further stabilize the chicken industry in Canada. Alberta producers have voted against joining the Canadian Chicken Marketing Agency. However, current interprovincial orderly marketing legislation is designed to encourage Alberta's compliance with the CCMA allocation for Alberta.

The reduced world coarse grain crop in 1983 is expected to keep feed prices well above last year until late summer-early fall 1984. For the first half of 1984, minimum prices paid to producers should remain almost at current levels, with some downward pressure caused by greater chicken supplies. Wholesale prices are expected to be above last year's levels, but will be moderated downward from current prices because of expanded chicken supplies and low red meat prices. Cost to consumers for chicken will likely also be higher than a year ago, and with red meat a better buy than last year, chicken consumption is expected to fall slightly to 205 Mkg for the first half of 1984 from the record level of 210 Mkg in 1983.

Although it is difficult at this time to forecast supply and price movements for chicken before the production quota has been established, the second half of 1984 should be favorable for chicken demand. Coarse grain producers will likely respond to current grain prices by expanding seeded area, thus increasing the 1984-85 harvest and pushing feed grain prices downward beginning in the third quarter. Pork supplies are expected to contract during the latter half of the year, thereby improving the demand situation for all poultry meat. It is anticipated that with the annual quota for chicken in 1984 set higher than 1983, supplies during the second half will be adequate to take advantage of favorable market conditions for chicken.

TURKEY

Rejean Laflamme

SITUATION

Canadian production of turkey during the first three quarters of 1983 totaled 69.2 Mkg, an increase of 1.7% over the same period in 1982. This additional turkey was mainly composed of hen weight birds (5-8 kg, eviscerated weight). Production in this category rose from 15.5 Mkg during the first 9 months of 1982 to 16.6 Mkg during the same period in 1983, an increase of 7.3%.

Apparent domestic disappearance rose 4.7% over 1982 during the January-October 1983 period to reach 57.1 Mkg. As in production, much of the increased consumption occurred in the hen weight category, which was up 26.3% or 2.2 Mkg. Broiler turkey (less than 5 kg, eviscerated weight) disappearance also increased, though less significantly than hens, to 8.6% above last year or an additional 1.88 Mkg.

On the other hand, consumption of tom turkeys (greater than 8 kg, eviscerated weight) decreased 5.6%. Turkeys in this category are sold directly to consumers as well as for further processing (i.e., cut-up, mechanically deboned for usé in sausages, salami and others). The further processing industry has not developed as quickly as many further processors believe is possible. The situation in Canada is

not consistent with the fact that nearly 70% of turkey consumption in the United States and several European countries is in the further processed form. Year-round availability of easily and quickly prepared turkey products in these countries has increased their level of turkey consumption.

To illustrate, Canadian per capita consumption of turkey has diminished from 4.73 kg to 4.00 kg during the last 10 years, while in the United States per capita consumption has increased from 3.76 kg to 4.90 kg during the same period. To modify this trend in Canada, production of tom turkeys must be "fully adequate" to ensure that the growth potential of the further processing industry is realized. In the past, the principal concern when establishing quota levels has been the demand for whole birds in the consumer market, thus sometimes limiting supplies for the further processor. As well, efficiencies in producing and slaughtering heavy tom turkeys are not generally reflected in wholesale prices in Canada.

As of October 1, 1983, stocks of frozen turkey in storage were 26.3 Mkg, 3.5% below last year and 3.2 Mkg below the 10-year average for that date. Relative to October 1, 1982, this decline in frozen inventory occurred only in the broiler weight category, with a 8.2% and 6.8% increase in hen and tom weight categories respectively.

Prices to producers for broiler turkey remained stable during the third quarter in spite of higher feed grain costs. Wholesale prices strengthened during the same period, but less than anticipated before Thanksgiving. Many retailers specialed turkeys, particularly in Ontario, where food chains offered their product for $1.96-$2.18/kg. This had a very positive effect on September consumption.

OUTLOOK

Canadian production of turkey during the fourth quarter will be approximately 26.5 Mkg. This will put 1983 annual production at 95.745 Mkg, compared to 1983 quota of 93.441 Mkg. However, 1.36 Mkg has been allocated to breeder credits, and some producers may delay slaughter of a portion of their flock until early 1984, but it is likely that 1983 production will exceed quota by close to 1 Mkg.

Consumption of turkey during the fourth quarter of 1983 could reach 43-44 Mkg, higher than the 41.7 Mkg of the fourth quarter 1982. This increase is explained by a greater supply of heavy hens, which have a higher average weight, and a per capita disposable income that is projected at 4.4% above last year. Wholesale prices could increase in the fourth quarter of 1983, especially for the broiler category, which will be in shorter supply.

Quota has been fixed at 89.1 Mkg for 1984, a decrease of 8% from 1983 anticipated production. Frozen storage stocks as of January 1, 1984 are expected to be near a 10-year low. Pork and beef market analysts

are predicting that production of red meat in the United States will begin to diminish towards the end of the second quarter of 1984. Consequently, a 20% or more increase is expected in the producer price of beef and pork for the third and fourth quarters of 1984 and the first quarter of 1985, which will increase the demand for poultry meat, including turkey. Meanwhile, the quota for 1984, established during the summer of 1983, is close to the lowest level since the inception of the agency in 1974. With an increase in demand predicted during the second half of 1984, this quota of 89.1 Mkg should ensure producer premiums, higher prices at all levels and supplementary imports.

Chicken supply can adjust rapidly to the new demand situation caused by the red meat market, as producers need only 7 weeks to raise a broiler chick to maturity. However, turkey producers require 14-21 weeks (depending on the category) before the birds are ready for slaughter. Chicken producers are therefore more likely to profit from the situation in the second half of 1984.

The Canadian Turkey Marketing Agency, External Affairs, and Agriculture Canada have developed a new export credit policy to facilitate Canadian exports of turkey and turkey products which should create new opportunities for exports.

For the first half of 1984, total consumption of turkeys should approximate 1983 consumption. As Easter arrives towards the end of April in 1984, disappearance should be lower during the first quarter and higher during the second quarter. If 1984 production does not exceed the current quota allocation of 89.1 Mkg, prices at both the wholesale and retail level should increase progressively during the last three quarters. This will seriously discourage consumption, which should drop considerably during the last half of the year.

The estimates as presented in Tables 1, 2, and 5 are based on a domestic production equal to the quota of 89.1 Mkg.

EGGS

Susie Miller

SITUATION

Marketings of eggs through registered grading stations increased almost 3% during the first three quarters of 1983 relative to the same period in 1982, in spite of no change in layer quota.

Price to producers for Grade A Large eggs at the beginning of 1983 were below 1982 levels, but escalated throughout the year as feed grain markets strengthened. Cost of production formula recommendations from the public hearings on producer egg prices in 1982 were also

implemented during the third quarter of 1983, which contributed to a slight price increase. The average price to producers (basis Ontario) for A Large eggs during the third quarter of 1983 was 98.7¢/dozen, 3.6% above the producer price for the third quarter of 1982.

Higher prices to producers were reflected in the price to retailers, up about 3% across Canada, and in higher prices to consumers. The CPI for the third quarter for eggs was about 2.8% over the third quarter last year. This contributed to a reduced table demand, prompting total domestic disappearance for January-October to fall 1% from consumption during the same period in 1982.

Falling consumption concurrent with a rise in commercial production increased the number of eggs declared surplus to table requirements. To the end of October, Canadian Egg Marketing Agency (CEMA) purchases of eggs under the surplus removal program were up about 40% over the same period in 1982. After Canadian breaker requirements for the domestic market were fulfilled, the CEMA sold the excess eggs to domestic breakers for the manufacture of processed egg for export and to American egg processors on a bid system. Due to the soft world market for both table and processed eggs, these actions cost the Canadian egg producer over $8 million.

Given the unexpected drop in table egg requirements and with an increase in marketings while quota was held constant, the CEMA has voted a 5% quota cut, effective January 1, 1984.

Contrary to the demand situation for table eggs, the apparent disappearance of processed egg has increased 6.3% during the first three quarters of 1983. Production of processed egg rose 9.3%, but much of this increase was in product destined for export. Exports were more than double last year's levels, most of it in the form of dried albumen to Japan and the U.S. Imports also were higher but a large part of this was liquid albumen for drying and reexport. Additional supplies for domestic use came from a drawdown in frozen and dried inventories, which as of November 1, 1983 were 20% below November 1, 1982 (liquid basis).

OUTLOOK

Results of the 5% quota cut are already evident; placements of chicks for egg production plummeted during the third quarter of 1983. Preliminary indications are that commercial marketings should fall more than 2% during the first half of 1984, but the decrease could be greater if hens are not retained for the average laying span of 12 months and/or the number of moulted layers decline.

Costs of production are anticipated to rise during the fourth quarter of 1983 and into the second quarter of 1984, following seasonal trends in feed costs. Abundant supplies of feed ingredients anticipated for the 1984-85 crop year should translate into lower costs for egg

producers in the latter half of 1984, and hence lower prices for eggs through to the consumer level. However, given higher prices expected for the January-June 1984 period, on average 1984 prices of eggs at all levels are expected to exceed 1983 prices.

Elevated prices to the consumer will continue to exert downward pressure on demand for table eggs. Total apparent consumption is expected to remain the same in 1983 and 1984, which indicates a drop in per capita consumption. There is some latitude for demand recovery during the second half of 1984 if prices at the retail level are kept sufficiently low and supplies of the most popular sizes of eggs are readily available. Given lower production and stable or increasing demand, surplus to table demand will be just sufficient to cover domestic breaker requirements. Except for some possible exports of shell eggs during the first two months of 1984, exports of shell eggs and egg product will be reduced to almost nil. Imports of shell eggs may be required in the peak consumption periods of Easter and Christmas.

As the economy continues to recover, demand for processed egg from the food processing and baking industries should continue to strengthen, especially during the first and second quarters. Breaker egg contracts with the CEMA would then likely be higher than last year during this period, since frozen and dried storage stocks are at such a level that a further drawdown to supply the market is not anticipated.

TABLE 1. AVERAGE PRICES TO PRODUCERS

	British Columbia	Alberta	Saskat-chewan	Manitoba	Ontario	Quebec	Nova Scotia
Eggs (Grade A Large) (¢/doz)							
1980 Average	89.9	87.9	86.9	79.9	84.9	86.7	90.9
1981 Average	101.9	100.0	98.9	92.8	96.9	98.9	102.9
1982 Average	98.1	96.3	96.3	90.2	93.3	95.7	99.3
1983 1st Quarter	96.7	94.7	95.7	88.7	91.7	94.7	97.7
2nd Quarter	99.7	97.7	98.1	91.5	94.7	97.5	100.7
3rd Quarter[1]	103.7	101.7	100.8	94.7	98.7	100.7	104.7
4th Quarter[2]	107-109	105-107	104-106	98-100	102-104	104-106	108-110
1984 1st Quarter[2]	110-112	108-110	107-109	101-103	105-107	107-109	111-113
2nd Quarter[2]	111-113	109-111	108-110	102-104	106-108	108-110	112-114
3rd Quarter[2]	108-110	106-108	105-107	99-101	103-105	105-107	109-111
4th Quarter[2]	105-107	103-105	102-104	96-98	100-102	102-104	106-108
Live broiler chicken (under 2.3 kg) (¢/kg)							
1980 Average	94.6	94.8	95.9	92.8	94.4	90.6	97.0
1981 Average	112.9	110.7	110.5	107.0	110.1	105.9	112.9
1982 Average	116.1	111.3	112.5	107.7	107.2	102.9	114.5
1983 1st Quarter	109.4	102.2	104.0	99.7	98.9	96.3	106.1
2nd Quarter	109.6	106.5	108.1	104.3	104.9	101.7	109.8
3rd Quarter[1]	113.9	111.5	113.3	108.9	110.7	108.0	115.7
4th Quarter[2]	-	-	-	-	112-116	109-113	-
1984 1st Quarter[2]	-	-	-	-	110-114	107-111	-
2nd Quarter[2]	-	-	-	-	110-114	107-111	-
3rd Quarter[2]	-	-	-	-	102-114	103-110	-
4th Quarter[2]	-	-	-	-	106-116	103-113	-
Live No. 1 broiler turkey (under 5.4 kg) (¢/kg)							
1980 Average	130.0	129.0	130.0	127.9	129.2	121.6	127.2
1981 Average	144.9	147.2	145.1	145.1	146.2	137.0	142.9
1982 Average	148.0	152.6	149.3	145.7	146.6	137.7	143.7
1983 1st Quarter	147.3	144.4	143.1	137.7	140.0	132.2	140.0
2nd Quarter	143.5	140.0	137.0	134.5	138.8	130.5	137.3
3rd Quarter[1]	143.5	138.1	136.0	132.6	138.6	129.3	137.4
4th Quarter[2]	-	-	-	-	145-150	135-139	-
1984 1st Quarter[2]	-	-	-	-	147-151	136-140	-
2nd Quarter[2]	-	-	-	-	148-152	137-141	-
3rd Quarter[2]	-	-	-	-	142-150	131-139	-
4th Quarter[2]	-	-	-	-	144-152	133-141	-

[1]Preliminary
[2]Forecast

Source: Agriculture Canada

TABLE 2. WHOLESALE PRICES TO RETAILER

	British Columbia	Alberta	Saskat-chewan	Manitoba	Ontario	Quebec	Nova Scotia
Eggs (Grade A Large) (¢/doz)							
1980 Average	108.3	110.6	107.6	99.4	101.4	107.5	114.2
1981 Average	124.8	126.0	121.7	116.0	114.6	122.4	127.9
1982 Average	126.7	128.5	124.6	115.5	111.7	124.3	126.8
1983 1st Quarter	127.3	127.0	127.2	115.6	110.3	122.6	125.7
2nd Quarter	131.4	129.7	128.4	118.1	113.4	126.1	128.7
3rd Quarter	135.2	133.7	128.9	120.3	117.3	129.9	133.2
4th Quarter[2]	136-140	134-138	132-137	123-127	120-124	132-135	134-138
1984 1st Quarter[2]	138-142	140-144	134-139	125-129	123-125	134-136	136-140
2nd Quarter[2]	139-143	141-143	135-140	126-130	124-126	135-138	137-141
3rd Quarter[2]	136-138	138-139	130-134	123-126	121-123	132-134	135-137
4th Quarter[2]	134-136	137-139	128-132	121-124	119-121	130-133	132-135
Broiler chicken (under 2 kg eviscerated) (¢/kg)							
1980 Average	N/A	N/A	N/A	N/A	N/A	N/A	N/A
1981 Average	N/A	N/A	230.7	N/A	200.7	207.4	221.7
1982 Average	N/A	N/A	230.5	N/A	195.5	199.6	231.0
1983 1st Quarter	219.5	N/A	N/A	N/A	181.9	190.4	215.4
2nd Quarter	219.2	N/A	N/A	N/A	197.1	196.2	222.2
3rd Quarter	223.0	N/A	N/A	N/A	223.1	218.1	225.1
4th Quarter[2]	-	-	-	-	223-227	-	-
1984 1st Quarter[2]	-	-	-	-	195-205	-	-
2nd Quarter[2]	-	-	-	-	200-210	-	-
3rd Quarter[2]	-	-	-	-	200-214	-	-
4th Quarter[2]	-	-	-	-	194-206	-	-
Broiler turkey (under 5 kg eviscerated) (¢/kg)							
1980 Average	N/A	N/A	N/A	N/A	N/A	N/A	N/A
1981 Average	N/A	N/A	N/A	N/A	N/A	223.1	229.6
1982 Average	N/A	N/A	N/A	N/A	N/A	N/A	251.9
1983 1st Quarter	N/A	N/A	N/A	N/A	233.4	N/A	257.2
2nd Quarter	N/A	N/A	N/A	N/A	219.1	210.0	242.3
3rd Quarter	N/A	N/A	N/A	N/A	225.5	N/A	243.2
4th Quarter[2]	-	-	-	-	239-243	-	-
1984 1st Quarter[2]	-	-	-	-	230-234	-	-
2nd Quarter[2]	-	-	-	-	235-240	-	-
3rd Quarter[2]	-	-	-	-	245-250	-	-
4th Quarter[2]	-	-	-	-	252-257	-	-

[1]Preliminary
[2]Forecast

Source: Agriculture Canada

TABLE 3. PROCESSOR GROSS MARGINS[1]

	British Columbia	Alberta	Saskat-chewan	Manitoba	Ontario	Quebec	Nova Scotia
Eggs (Grade A Large) (¢/doz)							
1980 Average	18.4	22.7	20.7	19.5	16.5	20.8	23.3
1981 Average	22.9	25.9	22.7	23.9	17.7	24.3	25.0
1982 1st Quarter	28.6	30.7	26.3	24.7	18.2	28.7	27.0
2nd Quarter	27.6	32.4	28.0	25.2	18.5	30.0	27.2
3rd Quarter	29.1	32.6	28.3	25.0	18.2	27.6	28.0
4th Quarter	29.2	33.1	29.7	26.3	18.6	27.9	28.0
1982 Average	28.6	32.2	28.1	25.3	18.4	28.6	27.6
1983 1st Quarter	30.6	32.3	31.5	26.9	18.6	27.9	28.0
2nd Quarter	31.7	32.0	30.3	26.6	18.7	28.6	28.0
3rd Quarter[2]	31.5	32.0	28.1	25.6	18.6	29.2	28.5
Broiler chicken (under 2 kg) (¢/kg)							
1980 Average	N/A	N/A	N/A	N/A	N/A	N/A	N/A
1981 Average	N/A	N/A	80.3	N/A	50.8	63.1	68.0
1982 1st Quarter	N/A	N/A	57.4	N/A	52.2	60.7	68.9
2nd Quarter	N/A	N/A	77.4	N/A	50.2	56.0	76.3
3rd Quarter	N/A	N/A	86.2	N/A	55.2	62.3	80.7
4th Quarter	66.9	N/A	89.1	N/A	41.4	59.6	75.2
1982 Average	N/A	N/A	77.5	N/A	49.8	59.7	75.3
1983 1st Quarter	70.7	N/A	N/A	N/A	47.3	59.4	71.0
2nd Quarter	70.1	N/A	N/A	N/A	54.4	57.8	72.8
3rd Quarter[2]	68.0	N/A	N/A	N/A	72.5	71.2	67.7
Broiler turkey (under 5 kg) (¢/kg)							
1980 Average	N/A	N/A	N/A	N/A	N/A	N/A	N/A
1981 Average	N/A	N/A	N/A	N/A	N/A	53.9	53.2
1982 1st Quarter	N/A	N/A	N/A	N/A	N/A	N/A	74.5
2nd Quarter	N/A	N/A	N/A	N/A	N/A	N/A	83.0
3rd Quarter	N/A	N/A	N/A	N/A	N/A	48.9	63.0
4th Quarter	N/A	N/A	83.7	N/A	N/A	61.4	77.6
1982 Average	N/A	N/A	N/A	N/A	N/A	N/A	74.5
1983 1st Quarter	N/A	N/A	N/A	N/A	60.6	N/A	84.4
2nd Quarter	N/A	N/A	N/A	N/A	47.7	48.9	72.8
3rd Quarter[2]	N/A	N/A	N/A	N/A	54.4	N/A	73.6

[1]Wholesale price less farm price, eviscerated equivalent

[2]Preliminary

TABLE 4. BALANCE SHEET FOR ALL CHICKEN IN CANADA ('000 kg)

	Open stocks	Domestic production	Imports (carc. & parts)	Imports (live)[1]	Total supply	Exports	End stocks	Disappearance
1980								
Annual	19 835	357 101	10 763	19 452	407 151	2 063	13 034	392 054
1981								
Annual	13 034	377 370	13 206	9 806	413 416	2 013	17 551	393 852
1982								
1st Quarter	17 551	89 897	3 628	3 140	114 216	0	16 892	97 324
2nd Quarter	16 892	96 980	3 289	2 936	120 097	0	14 461	105 636
3rd Quarter	14 461	94 445	3 695	3 176	115 777	0	11 760	103 017
4th Quarter	11 760	94 045	3 412	1 845	111 062	0	14 316	96 746
Annual	17 551	375 367	14 024	11 097	418 039	0	14 316	403 723
1983								
1st Quarter	14 316	92 451	3 630	2 642	113 039	0	11 793	101 246
2nd Quarter	11 793	99 472	5 004	2 876	119 145	-	10 344	108 801
3rd Quarter	10 344	92 239	4 869	2 848	110 300	-	7 551	102 749
4th Quarter[2]	7 551	92 000	2 800	2 200	104 551	-	10 651	93 900
Annual	14 316	376 162	16 303	10 566	417 347	-	10 651	406 696
1984								
1st Quarter[2]	10 651	94 900	-	-	-	-	-	99 000
2nd Quarter[2]	-	-	-	-	-	-	-	106 000
3rd Quarter[2]	-	-	-	-	-	-	-	108 000
4th Quarter[2]	-	-	-	-	-	-	-	96 000
Annual[2]	-	-	-	-	-	-	-	409 000

[1] Eviscerated equivalent
[2] Forecast

Source: Agriculture Canada

TABLE 5. BALANCE SHEET FOR ALL TURKEY IN CANADA ('000 kg)

	Open stocks	Domestic[3] production	Imports (carc. & parts)	Imports (live)[1]	Total supply	Exports[3]	End stocks	Disappearance
1980								
Annual	18 275	97 937	1 286	870	118 368	59	16 884	101 425
1981								
Annual	16 884	92 809	1 679	663	112 035	343	12 465	99 215
1982								
1st Quarter	12 465	16 449	1 020	104	30 038	24	14 263	15 751
2nd Quarter	14 263	18 516	109	12	32 900	0	16 747	16 153
3rd Quarter	16 747	33 085	64	1	49 897	0	27 267	22 630
4th Quarter	27 267	27 868	194	207	55 536	379	13 439	41 718
Annual	12 465	95 918	1 387	324	110 094	403	13 439	96 252
1983								
1st Quarter	13 439	16 638	507	61	30 645	55	13 079	17 511
2nd Quarter	13 079	19 622	190	0	32 891	70	18 423	14 398
3rd Quarter	18 423	32 928	91	169	51 611	136	26 310	25 165
4th Quarter[2]	26 310	26 557	858		53 725	120	10 105	43 500
Annual[2]	13 439	95 745	1 876		111 060	381	10 105	100 574
1984								
1st Quarter[2]	-	15 000	-	-	-	-	-	14 500
2nd Quarter[2]	-	17 500	-	-	-	-	-	17 500
3rd Quarter[2]	-	30 600	-	-	-	-	-	20 000
4th Quarter[2]	-	26 000	-	-	-	-	-	40 000
Annual[2]	-	89 100	-	-	-	-	-	92 000

[1]Eviscerated equivalent
[2]Forecast
[3]Includes live exports

Source: Agriculture Canada

TABLE 6. BALANCE SHEET FOR TABLE EGGS IN CANADA ('000 boxes of 15 doz)

	Eggs graded	Eggs imported	Total supply	Eggs exported	Eggs broken	Consumption from commercial supplies
1980						
Annual	26 618	391	27 009	590	2 935	23 484
1981						
Annual	27 059	286	27 345	815	2 789	23 741
1982						
1st Quarter	6 803	46	6 849	134	682	6 036
2nd Quarter	6 706	61	6 767	29	630	6 108
3rd Quarter	6 800	82	6 882	82	642	6 158
4th Quarter	6 803	294	7 097	6	557	6 534
Annual	27 112	483	27 595	251	2 548	24 796
1983						
1st Quarter	6 801	132	6 933	355	732	5 846
2nd Quarter	6 977	50	7 027	226	717	6 084
3rd Quarter[1]	7 105	76	7 181	389	664	6 128
4th Quarter[1]	7 037	-	-	-	-	6 500
Annual	27 920	-	-	-	-	24 558
1984						
1st Quarter[1]	6 730	-	-	-	-	5 900
2nd Quarter[1]	6 700	-	-	-	-	6 200
3rd Quarter[1]	-	-	-	-	-	6 200
4th Quarter[1]	-	-	-	-	-	6 600
Annual[1]	-	-	-	-	-	24 900

[1]Forecast

Source: Agriculture Canada

TABLE 7. BROILER CHICKEN - FEED PRICE RATIO, BY MONTH ONTARIO*

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Average 1973-77	3.67	3.73	3.82	3.94	3.84	3.76	3.70	3.71	3.85	3.91	3.94	3.91
1978	3.89	3.98	4.01	3.93	3.96	3.88	4.03	4.20	4.11	4.07	3.99	4.04
1979	3.91	3.98	3.86	3.94	3.91	3.73	3.41	3.37	3.42	3.41	3.55	3.68
1980	3.59	3.72	3.97	3.97	3.90	3.94	3.79	3.57	3.68	3.78	3.77	3.71
1981	3.68	3.73	3.79	3.94	3.84	3.87	3.98	4.02	4.21	4.37	4.62	4.60
1982	4.59	4.38	4.48	4.41	4.13	4.17	4.19	4.07	4.32	4.38	4.53	4.41
1983	4.13	4.14	4.09	4.18	4.01	4.02						

*The broiler chicken-feed price ratio is the number of kilograms of starter 22-24% protein and finisher 18-20% (simple average) that are equal in value to the farm price of one kilogram of broiler chicken. Ontario feed prices are based on Grain Facts, published by the Canadian Livestock Feed Board. Broiler chicken prices are based on the monthly average prices for regular weight birds on the Toronto Market.

TABLE 8. BROILER TURKEY - FEED PRICE RATIO, BY MONTH ONTARIO*

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Average 1973-77	4.71	4.75	4.69	4.79	4.77	4.63	4.45	4.62	4.78	4.93	5.15	5.13
1978	5.65	5.46	5.79	5.27	5.30	5.00	5.15	5.27	5.26	5.27	5.33	5.15
1979	5.05	5.29	5.23	5.19	5.19	5.33	5.09	4.96	4.91	4.85	5.18	5.27
1980	5.00	5.32	5.27	5.47	5.43	5.25	4.94	4.74	4.69	4.82	4.77	4.71
1981	5.07	5.01	5.12	5.24	5.24	5.14	5.44	5.53	5.31	5.60	5.84	6.09
1982	5.72	5.57	5.71	5.71	5.74	5.66	5.46	5.33	5.16	5.48	6.23	5.93
1983	5.86	5.39	4.84	5.43	5.02	5.11						

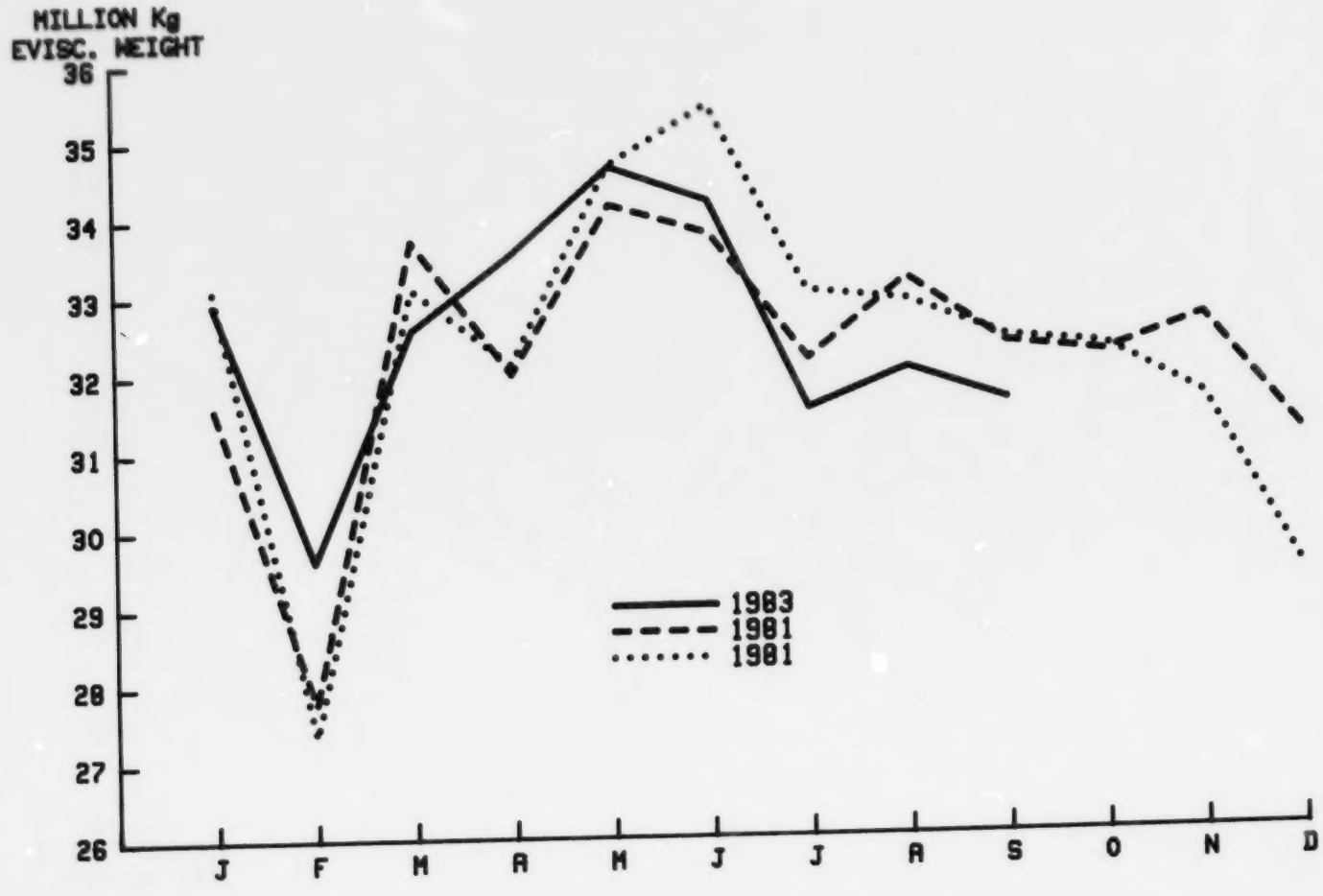
*The broiler turkey-feed price ratio is the number of kilograms of 16-22% protein turkey grower that are equal in value to farm price of one kilogram of broiler turkey. Ontario feed prices are based on Grain Facts, published by the Canadian Livestock Feed Board. Turkey prices are based on the monthly average price on the Toronto market.

TABLE 9. EGG - FEED PRICE RATIO, BY MONTH ONTARIO*

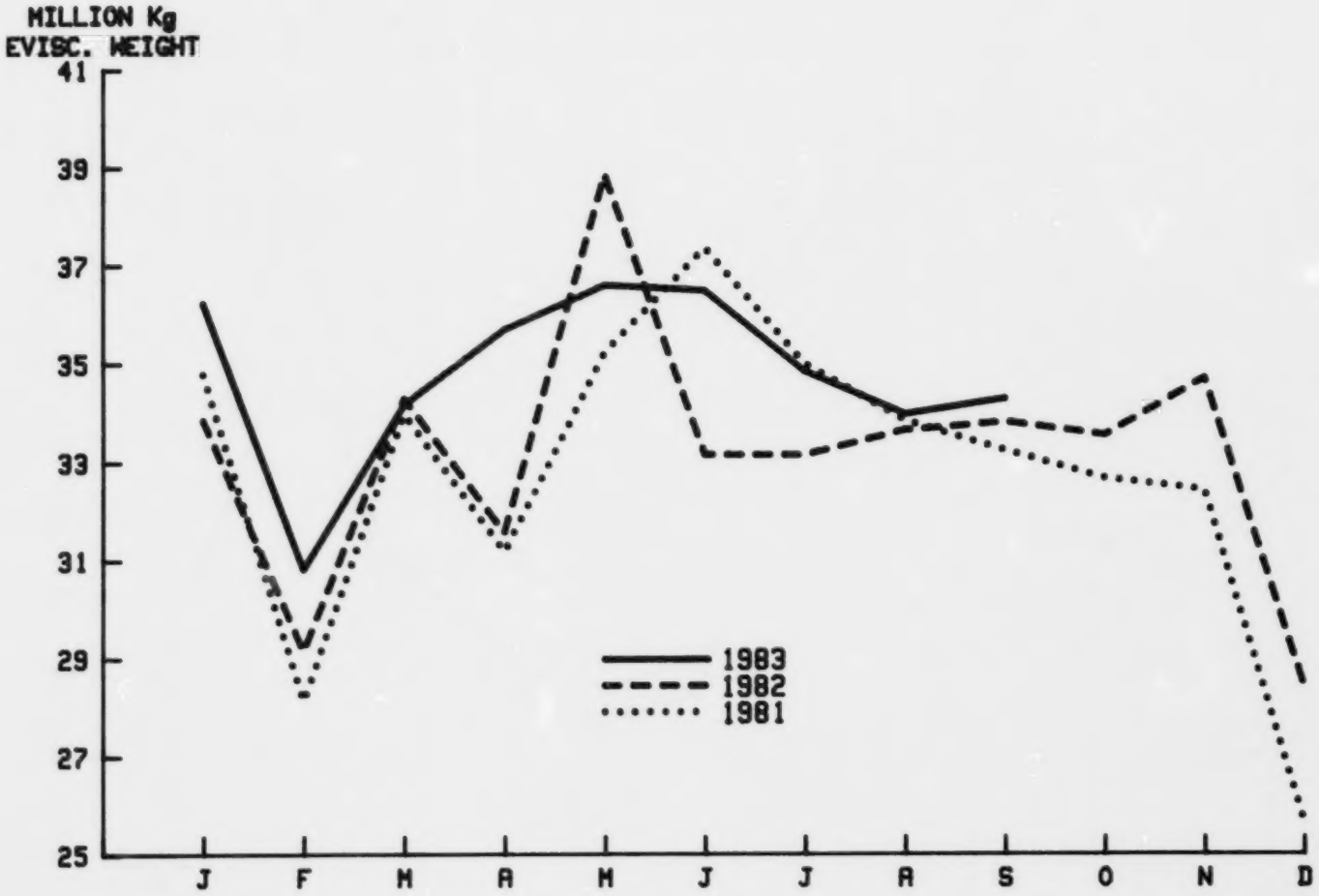
	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Average 1973-77	3.37	3.42	3.46	3.48	3.36	3.29	3.29	3.36	3.39	3.52	3.62	3.68
1978	3.71	3.72	3.74	3.65	3.58	3.58	3.53	3.63	3.61	3.57	3.46	3.51
1979	3.53	3.54	3.55	3.53	3.48	3.48	3.29	3.37	3.32	3.38	3.44	3.46
1980	3.51	3.58	3.52	3.64	3.56	3.55	3.52	3.30	3.28	3.39	3.36	3.29
1981	3.30	3.27	3.45	3.55	3.47	3.47	3.35	3.61	3.63	3.68	3.87	3.89
1982	3.85	3.71	3.76	3.77	3.68	3.57	3.65	3.65	3.92	3.92	4.13	3.95
1983	3.81	3.92	3.87	3.88	3.75	3.68						

*The egg-feed price ratio is the number of kilograms of 15-18% laying mash that are equal in value to the farm price of one dozen eggs. Ontario feed prices are based on Grain Facts, published by the Canadian Livestock Feed Board. Egg prices are based on the monthly average price to farmers for all grades.

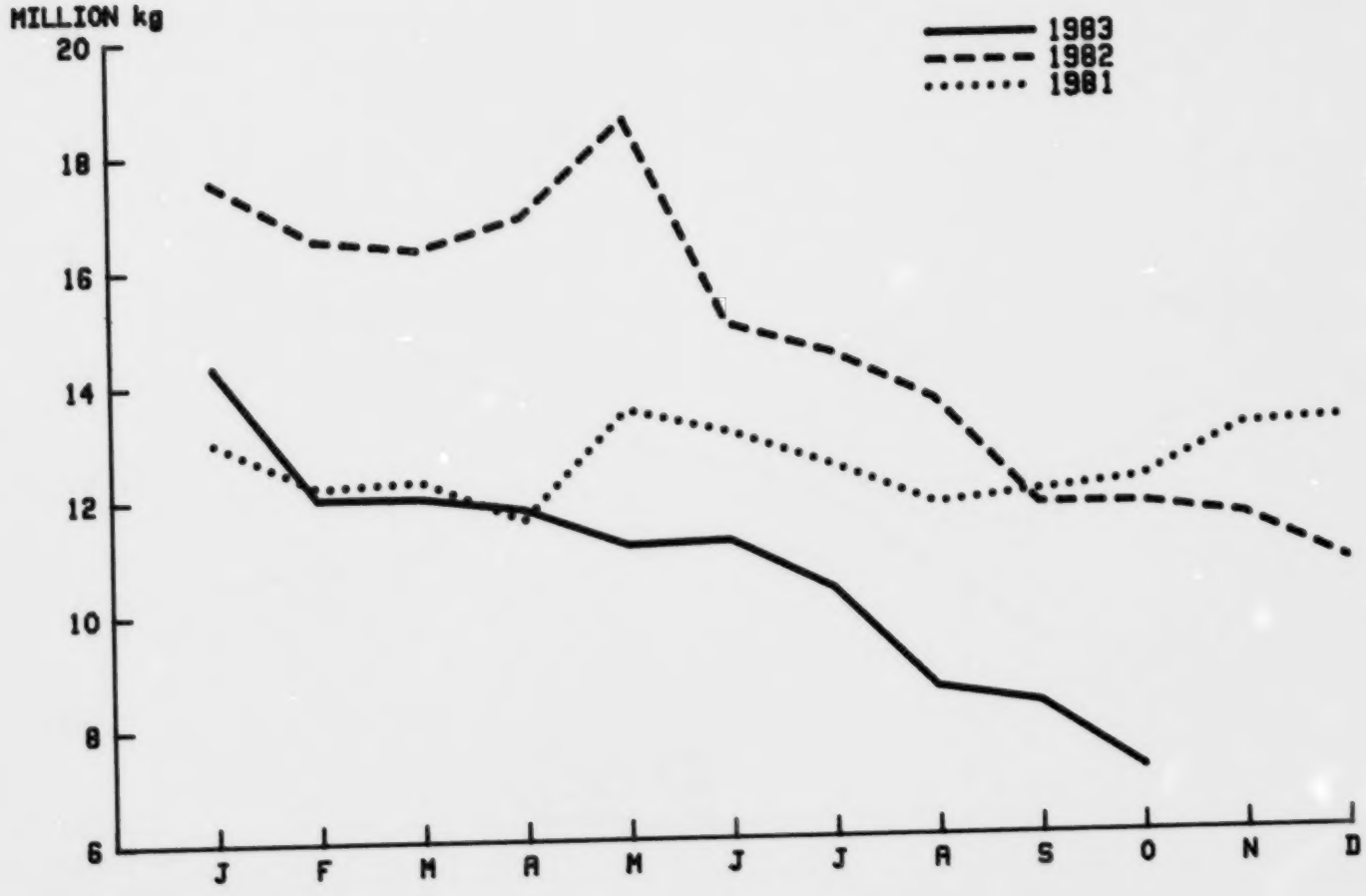
CHICKEN SLAUGHTERED IN REGISTERED STATIONS (ALL WEIGHTS), CANADA



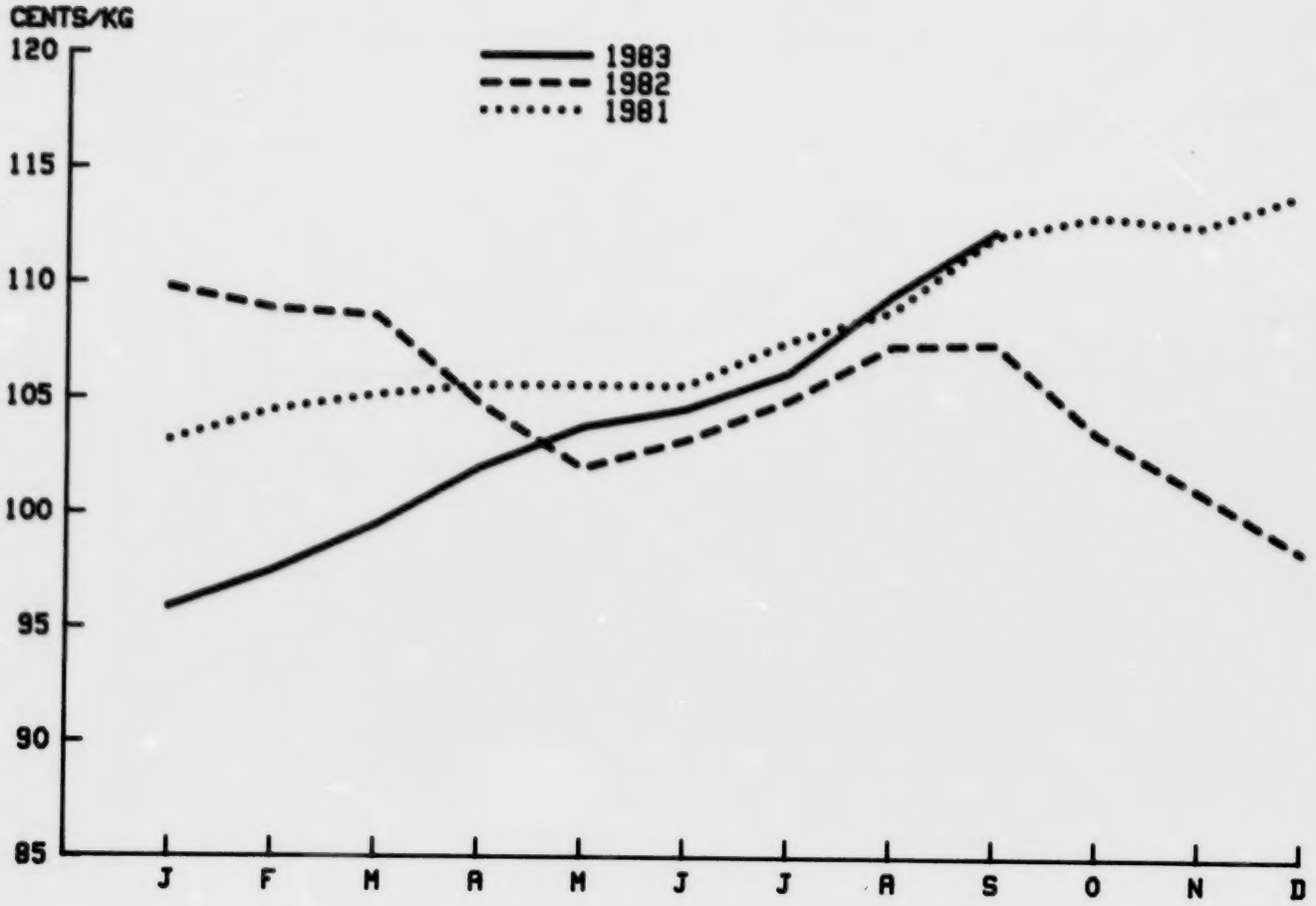
DOMESTIC DISAPPEARANCE OF CHICKEN FROM COMMERCIAL SUPPLIES (ALL WEIGHTS), CANADA



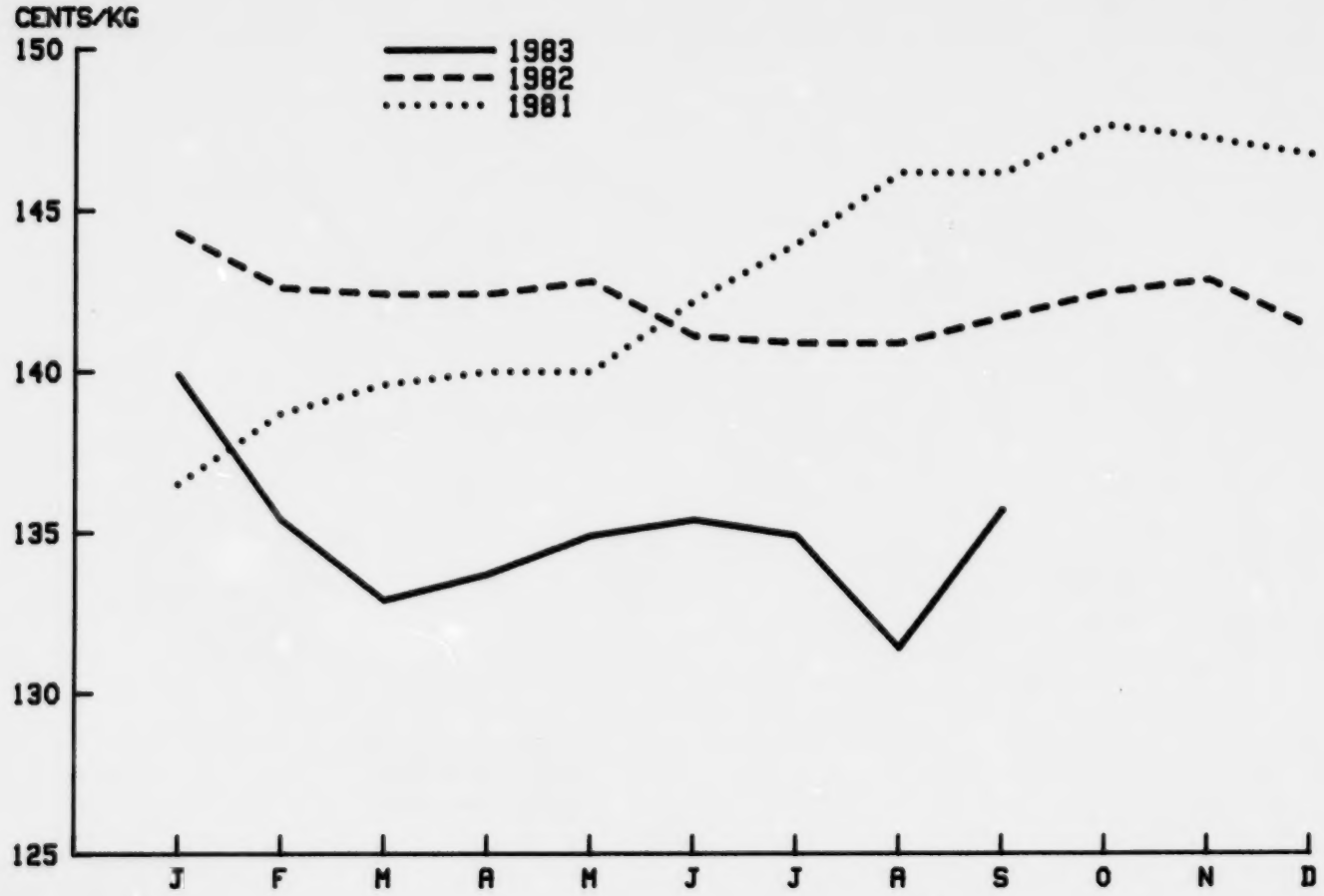
STORAGE STOCKS OF CHICKEN (ALL WEIGHTS), FIRST OF THE MONTH, CANADA,



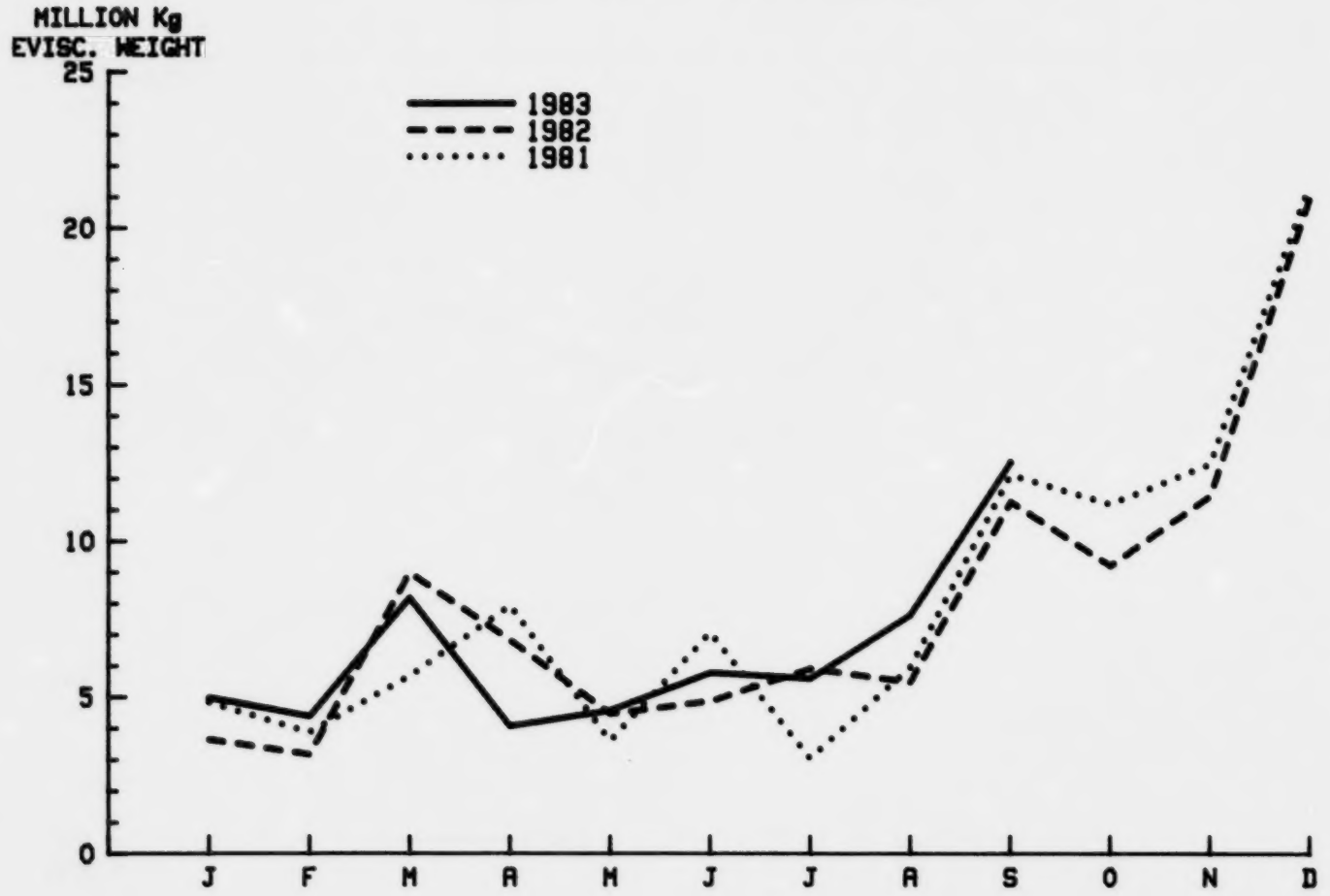
MONTHLY BROILER CHICKEN PRICES, ONTARIO AND QUEBEC AVERAGE LIVE NO.1 TO PRODUCERS



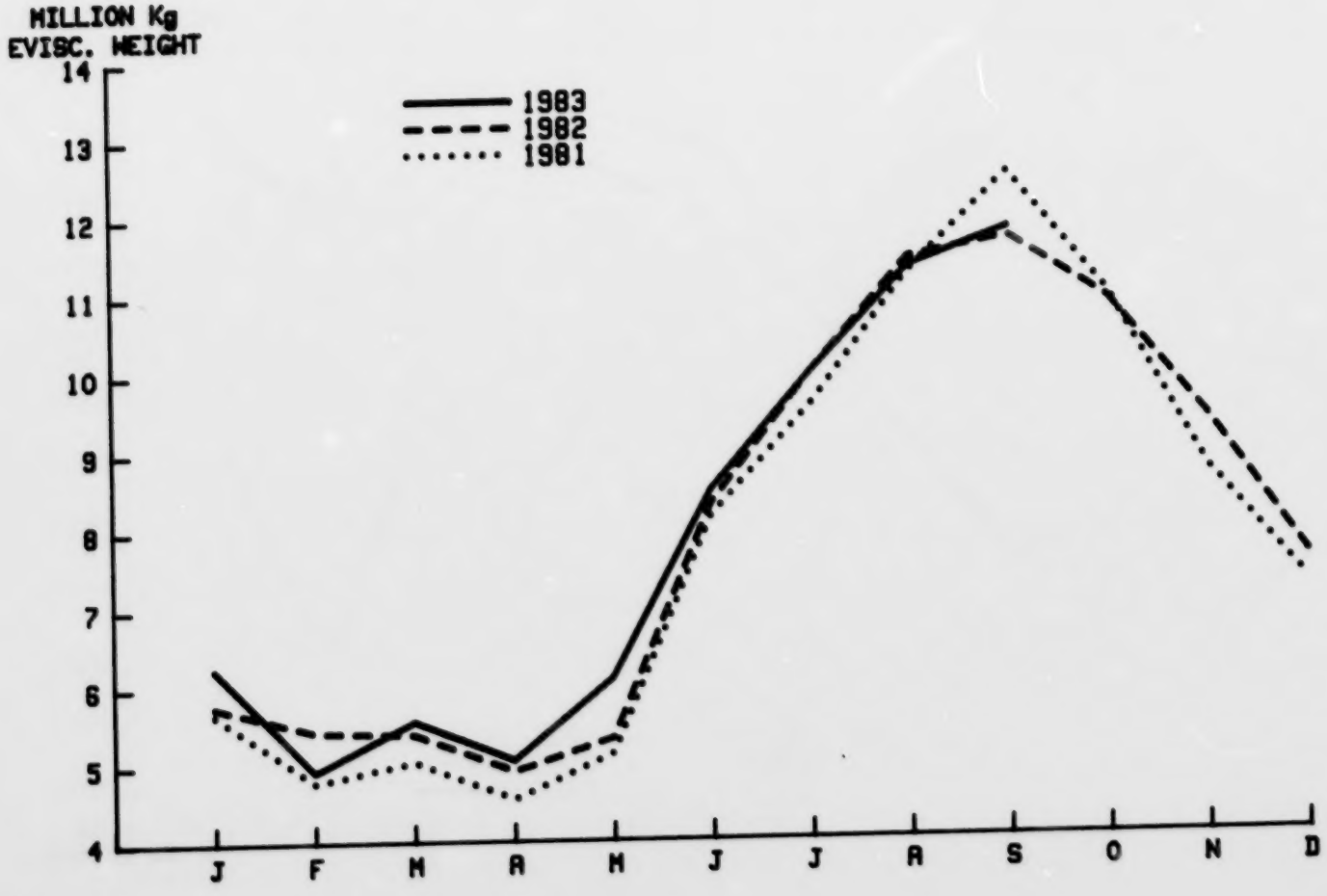
MONTHLY PRICE OF BROILER TURKEYS (UNDER 5.4 kg.) LIVE NO.1 TO PRODUCERS, ONTARIO AND QUEBEC AVERAGE



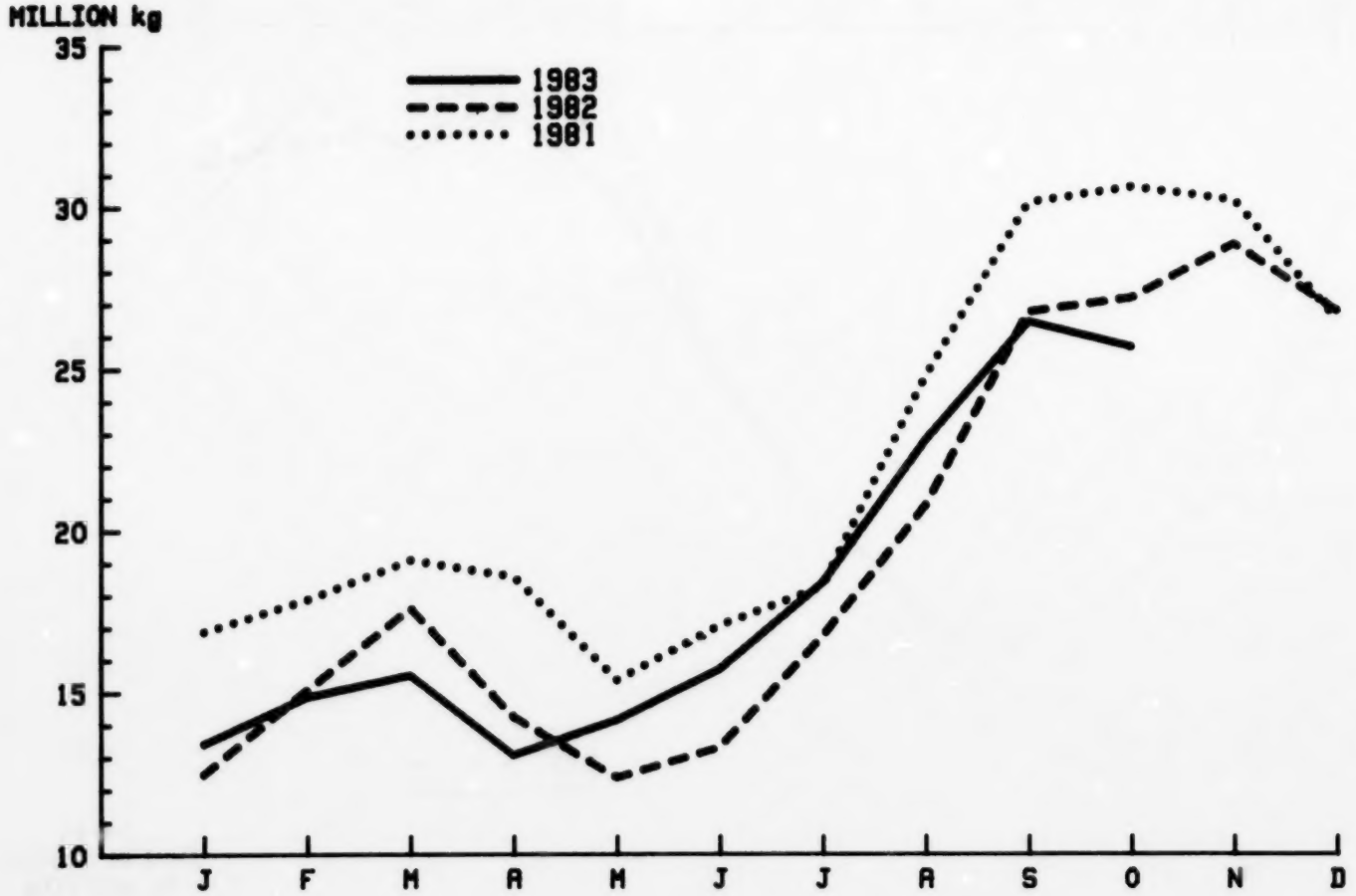
DOMESTIC DISAPPEARRANCE OF TURKEYS FROM COMMERCIAL SUPPLIES, (ALL WEIGHTS) CANADA



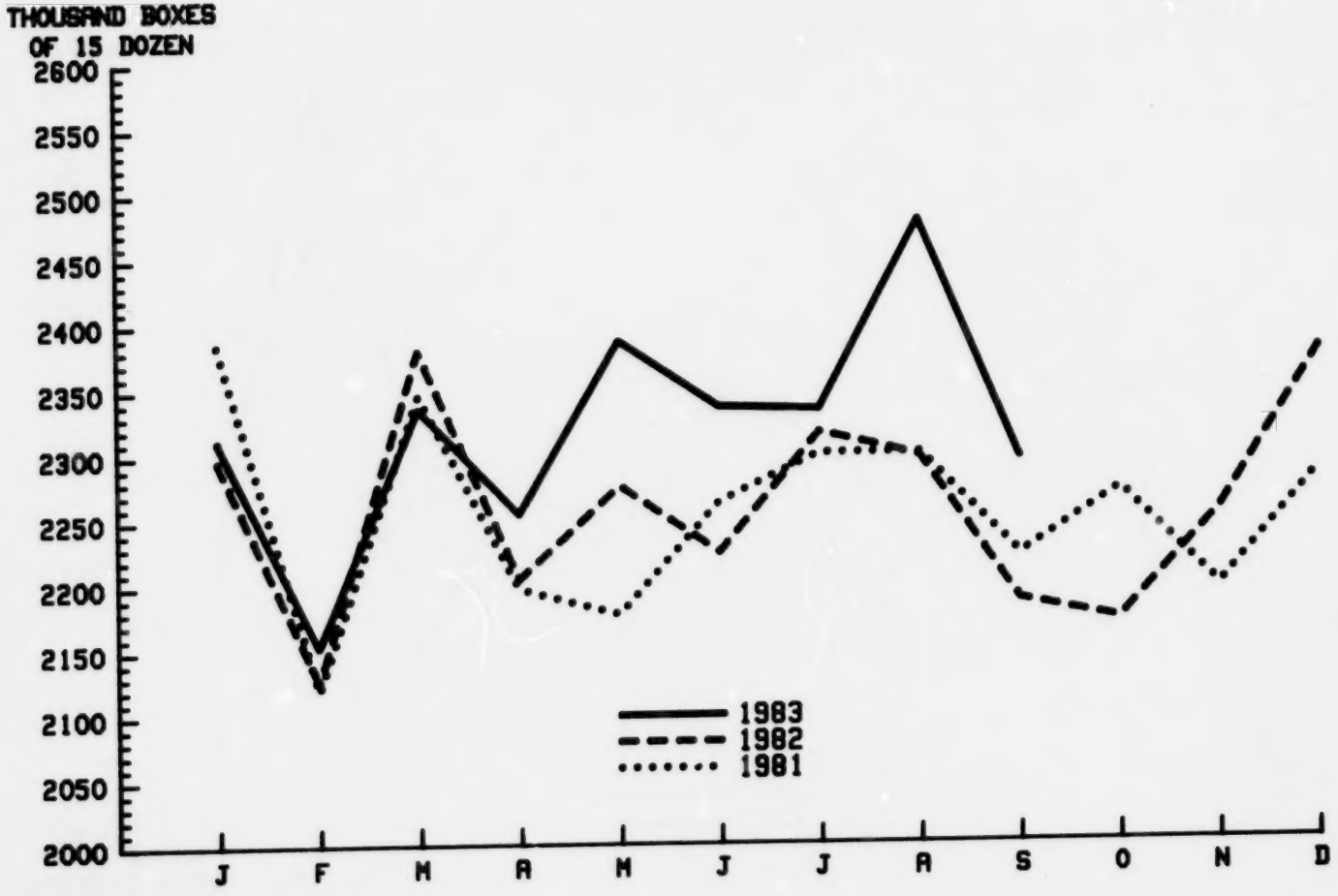
TURKEYS SLAUGHTERED IN REGISTERED STATIONS (ALL WEIGHTS), CANADA



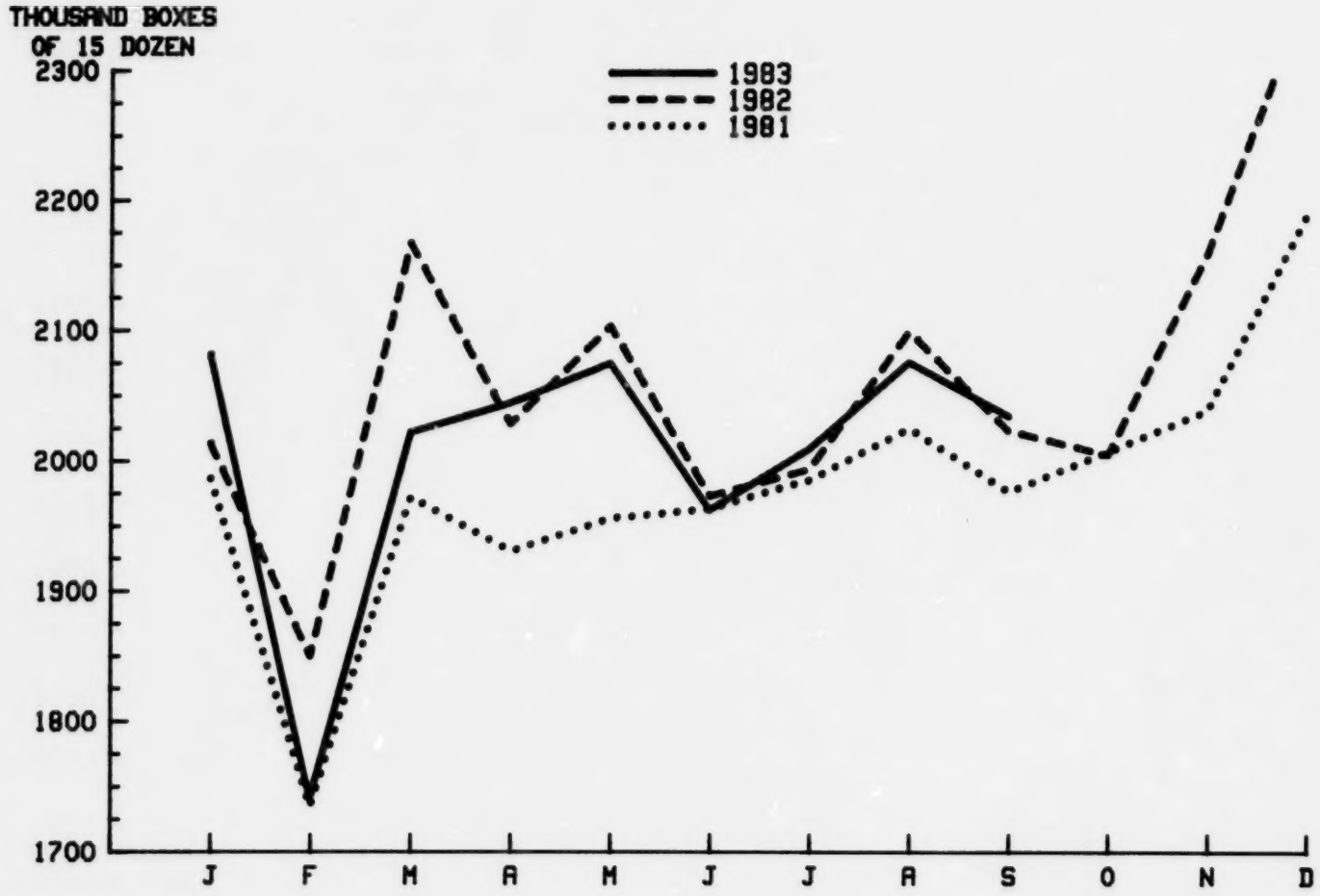
STORAGE STOCKS OF TURKEYS (ALL WEIGHTS), FIRST OF THE MONTH, CANADA



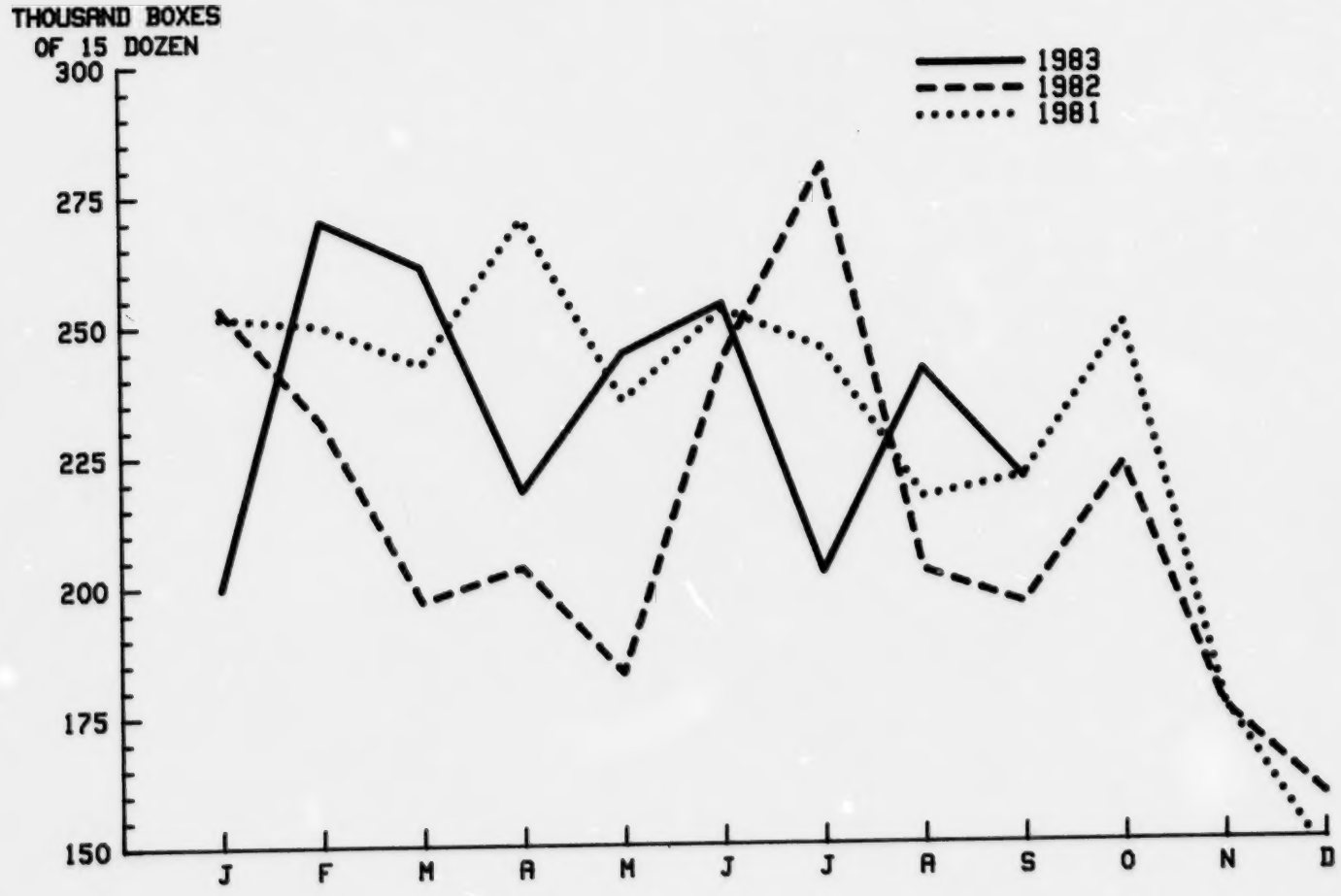
RECEIPTS OF SHELL EGGS AT REGISTERED GRADING STATIONS, CANADA



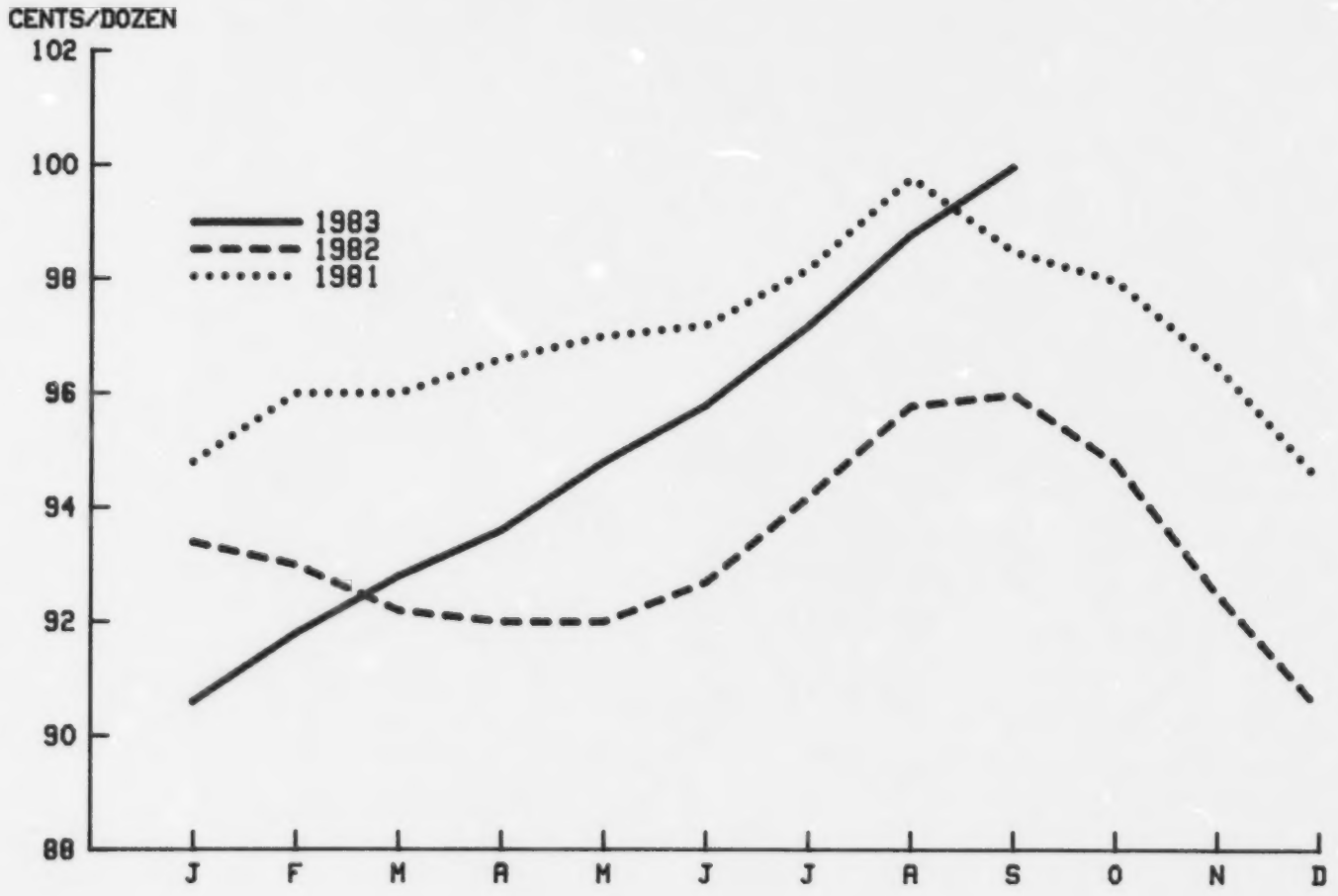
MOVEMENT OF SHELL EGGS TO CONSUMER OUTLETS, CANADA



EGGS BROKEN IN REGISTERED EGG PROCESSING STATIONS, CANADA



MONTHLY AVERAGE PRICE TO PRODUCERS OF GRADE A LARGE EGGS, ONTARIO



APPENDIX

TABLE 1. CHICKS AND POULTS PLACED ON FARMS, IN CANADA, BY MONTH, 1979 TO 1983
TABLEAU 1. POUSSINS ET DINDONNEAUX PLACES SUR LES FERMES, CANADA PAR MOIS, 1979 A 1983

	Jan. Janv.	Feb. Fev.	Mar. Mars	April Avril	May Mai	June Juin	July Juil	Aug. Aout	Sept. Sept.	Oct. Oct.	Nov. Nov.	Dec. Dec.	Total Total	
					- thousand head - - milliers de têtes -									
Egg Production Chicks														**Poussins pour la ponte**
1979	1665	1549	2077	3019	2980	2499	2024	1694	1677	2067	2025	2001	25277	1979
1980	1807	1799	2193	2915	3108	2502	2231	1383	1761	1993	1942	2062	25696	1980
1981	1693	1625	2296	2888	2868	2383	1807	1500	1635	1901	2125	1847	24568	1981
1982[1]	1783	1527	2163	2762	3045	2543	1857	1494	1520	2112	2482	1908	25196	1982[1]
1983[1]	1660	1692	2103	2905	2996	2386	1783	1386	1410	0	0	0	0	1983[1]
Broiler Chicks														**Poulets à griller**
1979	24294	22164	25101	26020	27528	26473	24661	24827	21925	25128	20278	23503	291902	1979
1980	23478	23241	25294	25138	25767	22702	24567	22914	23413	23735	20738	23441	284428	1980
1981	23977	22344	26128	25816	25434	24918	24763	23657	22454	24393	19979	21022	284885	1981
1982[1]	22798	21335	24667	24452	25256	22932	24908	23724	22283	23754	21468	23360	280937	1982[1]
1983[1]	22952	21126	24241	24955	24976	23321	23556	23451	21523	0	0	0	0	1983[1]
Broiler Weight Turkey Poults														**Poids léger à Griller Dindonneaux**
1979	860	723	844	801	946	886	978	1073	872	870	876	1009	10738	1979
1980	922	752	925	700	754	822	765	755	884	886	845	758	9768	1980
1981	871	754	745	595	729	786	840	849	890	867	829	756	9511	1981
1982[1]	852	706	870	609	707	649	873	899	814	736	786	816	9317	1982[1]
1983[1]	635	685	784	525	604	675	776	701	544	0	0	0	0	1983[1]
Heavy Weight Turkey Poults														**Poids lourd Dindonneaux**
1979	601	1029	1400	1919	1682	1273	882	558	356	294	497	381	10872	1979
1980	566	854	1281	1868	1647	1183	753	434	204	221	291	227	9529	1980
1981	552	834	1240	1702	1430	1203	874	551	307	288	398	179	9558	1981
1982[1]	574	671	1347	1542	1665	1154	943	672	297	338	395	288	9886	1982[1]
1983[1]	713	849	1247	1873	1540	1147	907	755	358	0	0	0	0	1983[1]

1. Preliminary
Provisoire

Source: Agriculture Canada

TABLE 2. PRODUCTION OF POULTRY MEAT IN CANADA, BY PROVINCE, 1970-79 TO 1982[1]
TABLEAU 2. PRODUCTION DE VIANDE DE VOLAILLE PAR PROVINCE AU CANADA, 1970-79 A 1982[1]

	Average 1970-79 Moyenne	1979	1980	1981	1982	
	- tonnes eviscerated weight basis - - tonnes poids éviscéré -					
Chicken						**Poulets**
Canada	645143	401404	390203	398799	397376	Canada
Prince Edward Island	933	742	368	110	481	Ile du Prince Edouard
Nova Scotia	21187	13754	13699	13486	13113	Nouvelle Ecosse
New Brunswick	15731	10753	10475	10576	10547	Nouveau Brunswick
Quebec	227018	128221	129545	125555	128345	Quebec
Ontario	213307	134191	128418	131992	129280	Ontario
Manitoba	31507	18803	18947	18436	18415	Manitoba
Saskatchewan	24357	13294	12809	12013	12263	Saskatchewan
Alberta	55736	38275	37175	40213	42387	Alberta
British Columbia	56245	43371	38766	42381	37802	Colombie-Britannique
Fowl						**Poules**
Canada	59709	28051	31082	32443	32573	Canada
Prince Edward Island	264	119	127	120	121	Ile du Prince Edouard
Nova Scotia	2376	1195	1323	1395	1160	Nouvelle Ecosse
New Brunswick	1344	948	1022	1144	970	Nouveau Brunswick
Quebec	9713	4624	5230	5461	5599	Quebec
Ontario	22609	9883	11138	11582	11588	Ontario
Manitoba	6211	2898	3136	2986	2871	Manitoba
Saskatchewan	3646	1939	1218	2328	2252	Saskatchewan
Alberta	6843	3155	3346	3328	3582	Alberta
British Columbia	6701	3290	4542	4100	4150	Colombie-Britannique
Turkey						**Dindons**
Canada	195042	102413	100454	95435	97510	Canada
Prince Edward Island	39	13	4	0	4	Ile du Prince Edouard
Nova Scotia	2569	1874	1908	1723	1683	Nouvelle Ecosse
New Brunswick	1396	1075	988	1119	1174	Nouveau Brunswick
Quebec	47670	24012	23875	21642	22890	Quebec
Ontario	83763	45210	42597	42082	41380	Ontario
Manitoba	16216	8377	8574	7498	8128	Manitoba
Saskatchewan	8541	4326	3204	4090	4730	Saskatchewan
Alberta	16366	8273	9934	8854	8046	Alberta
British Columbia	18492	9253	9370	8426	9475	Colombie-Britannique

1. Total production includes output not marketed through registered processing plants.
Production totale, y compris les quantités non reçues aux postes enregistrés.

Source: Statistics Canada.
Statistique Canada

TABLE 3. BROILERS[1] : MINIMUM[2] AVERAGE PRICES PAID TO PRODUCERS FOR LIVE NO.1 AT TORONTO, 1970-79 TO 1983
TABLEAU 3. POULETS A GRILLER VIVANTS[1] : CATEGORIE NO.1, PRIX MINIMUMS[2] PAYES AUX PRODUCTEURS A TORONTO, 1970-79 A 1983

	Jan. Janv.	Feb. Fev.	Mar. Mars	April Avril	May Mai	June Juin	July Juil	Aug. Aout	Sept. Sept.	Oct. Oct.	Nov. Nov.	Dec. Dec.	Average Moyenne	
					- cents per kilo - - cents le kilo -									
Average 1970-79	63.7	65.2	66.6	66.9	67.4	68.2	68.7	69.6	70.2	69.7	68.4	68.1	67.7	Moyenne 1970-79
1979	85.6	87.8	89.1	90.4	90.6	90.4	87.3	86.4	85.1	85.5	86.9	86.9	87.7	1979
1980	87.9	89.3	91.7	91.0	90.2	90.2	90.2	93.5	98.1	101.4	104.7	103.8	94.3	1980
1981	104.7	106.0	106.9	107.6	107.6	107.6	110.4	112.4	115.1	115.5	115.1	112.6	110.1	1981
1982	112.2	111.2	110.6	108.0	105.5	105.5	107.1	109.5	109.5	104.3	103.0	99.2	107.1	1982
1983	96.8	98.5	101.5	103.8	104.8	106.0	107.7	111.0	113.6	0.0	0.0	0.0	0.0	1983

1. Under 2.3 Kilos
   Moins de 2.3 Kilos
2. Before January 1, 1976, average of the range used.
   Avant le 1er janvier 1976, la cote moyenne a été utilisé.

Source: Agriculture Canada

TABLE 4. YOUNG TURKEYS : MONTHLY AVERAGE PRICES PAID TO PRODUCERS FOR LIVE NO.1 AT TORONTO[1], 1970-79 TO 1983
TABLEAU 4. DINDES VIVANTS : CATEGORIE NO.1, PRIX PAYES AUX PRODUCTEURS A TORONTO[1], 1970-79 A 1983

	Jan. Janv.	Feb. Fev.	Mar. Mars	April Avril	May Mai	June Juin	July Juil	Aug. Aout	Sept. Sept.	Oct. Oct.	Nov. Nov.	Dec. Dec.	Average Moyenne	
						- cents per Kilo - - cents la Kilo -								
Under 5.4 Kg.														Moins de 5.4 Kg.
Average 1970-79	82.3	81.9	82.4	82.6	83.1	83.4	84.5	85.8	87.4	88.1	89.0	90.2	85.1	Moyenne 1970-79
1979	115.7	116.6	117.5	118.8	120.2	121.0	123.5	124.6	124.6	127.0	128.7	128.5	122.2	1979
1980	129.0	129.0	129.0	129.0	128.1	126.1	124.1	125.2	127.0	131.8	133.6	138.0	129.2	1980
1981	143.1	144.6	145.5	145.5	145.5	148.4	149.9	149.6	149.9	151.9	153.2	151.7	148.2	1981
1982	148.9	147.3	147.3	147.3	148.1	144.8	144.3	144.3	145.8	147.5	148.3	145.3	146.6	1982
1983	144.3	140.3	135.3	136.9	139.3	140.2	139.3	135.3	141.3	0.0	0.0	0.0	0.0	1983
Over 5.4 and under 9 Kg.														Plus de 5.4 Kg. et m
Average 1970-79	84.2	72.4	72.3	67.1	67.5	74.2	80.7	87.3	88.8	89.4	91.0	92.2	80.6	Moyenne 1970-79
1979	115.1	115.5	116.4	116.8	117.9	119.7	123.4	124.6	124.6	127.0	128.7	128.5	121.5	1979
1980	127.0	125.7	124.8	124.6	123.0	120.6	123.0	124.1	126.8	128.3	129.6	133.6	125.9	1980
1981	133.4	135.6	134.5	135.4	135.6	139.3	145.7	146.6	147.3	150.8	152.1	150.1	142.0	1981
1982	142.8	141.5	141.5	141.5	141.1	141.0	145.5	145.5	148.5	147.9	146.5	143.5	143.9	1982
1983	138.3	131.0	129.0	129.0	131.0	131.0	134.7	131.5	137.5	0.0	0.0	0.0	0.0	1983
9 Kg. and over														9 Kg. et plus
Average 1970-79	82.0	82.7	83.3	84.2	84.8	85.6	86.8	87.0	87.2	87.1	88.1	89.0	85.6	Moyenne 1970-79
1979	115.1	116.2	117.5	120.1	121.2	123.0	123.5	124.6	124.6	127.0	129.6	130.1	122.7	1979
1980	133.4	134.5	133.6	133.4	131.8	129.4	123.0	124.1	124.1	125.2	125.2	128.5	128.9	1980
1981	136.7	140.2	144.4	144.4	144.4	147.3	146.4	145.5	145.9	149.7	151.0	149.0	145.4	1981
1982	147.2	149.5	149.5	149.5	149.1	149.0	144.5	144.5	147.5	146.9	145.5	142.5	147.1	1982
1983	143.5	147.0	143.0	143.0	143.0	143.0	137.9	135.5	139.5	0.0	0.0	0.0	0.0	1983

1. London price prior to October 1, 1973.
A London, avant le 1er octobre 1973.

Source: Agriculture Canada

TABLE 5. EGGS: PRODUCTION IN CANADA, BY PROVINCE, 1970-79 TO 1982
TABLEAU 5. OEUFS: PRODUCTION CANADIENNE, PAR PROVINCE, 1970-79 A 1982

	Average 1970-79 Moyenne	1979	1980	1981	1982	
	- thousand dozen - - milliers de douzaines -					
Canada	469625	468423	494556	496234	493559	Canada
Newfoundland	7608	7222	7399	7465	7317	Terre-Neuve
Prince Edward Island	2530	2716	2794	2874	2884	Ile du Prince Edouard
Nova Scotia	18264	16687	18778	18968	18791	Nouvelle Ecosse
New Brunswick	9068	8964	9380	9935	10021	Nouveau Brunswick
Quebec	71988	74867	78803	81677	79788	Quebec
Ontario	186112	180250	189250	196920	198109	Ontario
Manitoba	51815	48358	51358	50829	51556	Manitoba
Saskatchewan	21963	20566	21203	20948	20439	Saskatchewan
Alberta	41806	43924	46593	44784	44644	Alberta
British Columbia	57327	59077	62501	61834	60010	Colombie-Britannique

Source: Statistics Canada,
Statistique Canada

TABLE 6 EGGS : MONTHLY WEIGHTED AVERAGE PRICES RECEIVED BY FARMERS FOR ALL GRADES OF EGGS, AT REGISTERED STATIONS, CANADA, 1970-79 TO 1983

TABLEAU 6 OEUFS : PRIX (MOYENNE PONDEREE) PAYES AUX PRODUCTEURS DE TOUTES LES CATEGORIES D'OEUFS AUX POSTES EN REGISTRES DE CLASSEMENTS, CANADA, 1970-79 A 1983

	Jan. Janv.	Feb. Fev.	Mar. Mars	April Avril	May Mai	June Juin	July Juil	Aug. Aout	Sept. Sept.	Oct. Oct.	Nov. Nov.	Dec. Dec.	Average Moyenne	
	- cents per dozen - - cents la douzaine -													
Average 1970-79	52.6	51.2	51.7	51.7	51.5	50.9	52.3	53.7	54.3	54.6	55.3	56.8	53.0	Moyenne 1970-79
1979	69.6	70.2	70.9	71.4	71.3	71.9	73.2	74.1	74.6	75.2	75.8	75.2	72.8	1979
1980	76.4	77.9	77.2	77.2	76.6	75.9	76.7	77.6	79.7	82.4	84.1	85.9	79.0	1980
1981	88.6	89.8	89.9	90.4	90.5	90.6	91.5	92.7	91.8	91.6	90.6	88.6	90.6	1981
1982	87.9	87.4	87.1	86.6	86.1	86.6	87.8	89.1	89.7	89.0	87.0	85.2	87.5	1982
1983	85.5	86.4	87.1	87.9	88.7	88.4	88.4	89.0	90.7	0.0	0.0	0.0	0.0	1983

Source: Agriculture Canada

MILK AND DAIRY PRODUCTS

G. Birks
C. Desbiens

HIGHLIGHTS

Dairy product prices will increase during the current dairy year as input price increases, particularly feed costs, are reflected in the respective milk pricing formulas, and because the restraints imposed by the 6 and 5 program on dairy producers are scheduled to end on March 31, 1984.

Production of milk and dairy products is probably the largest unknown for the year. Market Share Quota has been increased by 2% but the forecast for milk and dairy product consumption is less optimistic. Stocks of butter continue to be a problem and the potential exists for increases by the end of the dairy year.

The world outlook forecast is for continued weakness in the international dairy market. Efforts to bring excess production under control in the United States, under the umbrella of the Compromise Dairy Bill, and in the EEC may not be successful in the short run. However, in the longer term both the U.S. and the EEC have shown a willingness to make the necessary adjustments to bring production under control.

A REVIEW OF THE 1982-83 DAIRY YEAR

The dairy year 1982-83 was one of the more volatile years in the recent history of the dairy program. Total farm sales of milk and cream during this period achieved a level of 74.59 million hectolitres, virtually unchanged from the year-earlier period. At the same time, fluid milk sales declined about 2% to 25.65 million hectolitres, while the production of industrial milk and cream increased to 48.93 million hectolitres, indicating a 1% increase over year-earlier levels and nearly 5% over quota. While on the surface these production levels indicate rather minor overall adjustments, in reality changes during the year were quite significant.

On August 1, 1982, the 49 925 milk and cream producers registered with the Canadian Dairy Commission were issued Market Share Quota totaling 47.6 million hectolitres. During the early months of that year, there was a significant increase in milk production, which, combined with low demand, caused surplus stocks of dairy products to increase dramatically. In order to bring production under control, the Canadian Milk Supply Management Committee reduced MSQ almost 2% to 46.7 million hectolitres effective January 1, 1983. Consequently, producers were forced to make significant reductions in production during the second half of the year. An indication of the severity of these changes is that as of July 1, 1983, numbers of milk cows totaled 1.717 million head, nearly a 3% reduction from the year-earlier figure of 1.765

million head. Similarly, for the dairy year as a whole, the rate of slaughter of D4s and D5s, which are mostly dairy cows, increased 8.9% in Canada, with Ontario showing a 46.2% increase and Quebec a 3.7% increase. The reason for the very large difference between Ontario and Quebec is at the present time unclear.

At the product level, the 1982-83 dairy year was characterized by significant retail price specialing for butter and fluid milk, events which had considerable impact on the demand for those particular products.

Total butter production for the year was 111 173 t, exports were in the order of 4000 t and August 1, 1983 stock levels were, according to Statistics Canada, about 33 000 t. In combination, these figures indicate that total butter consumption is about 109 000 t, a 2% increase. However, stock levels of 33 000 t on August 1, 1983 would tend to indicate that industry inventories, as opposed to CDC inventories, were at historically low levels which seem unreasonable for that time of the year. Therefore it is expected that these inventory figures will be revised upward and that actual butter consumption for the period will be in the order of 107 500 t, a very minor change over the preceding year.

Cheddar production was up considerably in 1982-83 to 97 300 t as the processing sector diverted more milk into cheddar cheese production. Despite these production increases, consumption increased only marginally to 92 744 t, probably due to consumers reacting to continually high prices. As a consequence, cheddar stocks rose sharply to 40 000 t, up about 4%.

Variety cheeses, on the other hand, continued to provide some strength to the dairy sector. Production levels increased 1% to 80 000 t, while consumption continued its longstanding trend by increasing about 3% to almost 100 000 t. Moreover, stocks of variety cheeses declined by 5% to just under 12 000 t.

Production of skim-milk powder, reflecting the milk production reductions of the latter part of the year, declined 13% in 1982-83 to 137 000 t. At the same time consumption decreased by 17%. Internationally, world prices continued to weaken as huge surpluses of butter and powder from the U.S. and the EEC continued to threaten the stability of the world market. Canadian exports of skim milk powder increased 55% and relieved pressures caused by large surpluses of skim-milk powder. In fact, stocks declined 61%.

Evaporated milk data continue to show variation during the year and between years. Statistics Canada data indicate that domestic consumption doubled in 1982-83; thus seems unlikely and changes are anticipated.

OUTLOOK 1983-84

FACTORS

Production

Industrial milk production in Canada, besides being affected by such physical characteristics as herd size, weather, and the price and availability of feed, is largely determined by the level of Market Share Quota and levy rates as established by the Canadian Milk Supply Management Committee (CMSMC). For the dairy year 1983-84, the CMSMC increased the overall national quota allocation by almost 2% to 47.6 million hectolitres. This total is forecast by the CMSMC, according to the sum of domestic requirements of 44.5 million hectolitres, the special export program of 2.2 million hectolitres, and a 2% sleeve of 0.9 million hectolitres. A comparison of these figures with 1982-83 is presented in Table 1, and the provincial distribution of the 1983-84 Market Share Quota on a butterfat basis is shown in Table 2.

TABLE 1. A COMPARISON OF MARKET SHARE QUOTA 1982-83, 1983-84

	Market Share Quota 1982-83 and 1983-84	
	1982-83 (Jan. 83)	1983-84 (Aug. 83)
	million hectolitres	
Domestic requirements	42.8	44.5
Sleeve	1.7	0.9
Quota for export	2.2	2.2
Total	46.7	47.6

It should be noted that the figures reported in tables 1 and 2 do not make allowances for the non-participation of British Columbia in the National Milk Marketing Plan. In point of fact, B.C, is actually producing almost 600 000 kg of butterfat more than the figures shown.

In addition to the allocation of quota, levy rates can have a significant impact on producer milk production decisions. A comparison of the levy rate structures for 1982-83 and 1983-84 is presented in Table 3.

TABLE 2. PROVINCIAL DISTRIBUTION OF MARKET SHARE QUOTA'S

Province	Market Share, Market Share Quota and Quota for Export by province as of August 1, 1983				
	Domestic share	Allocation of non-optional quota for exports	Sleeve 2%	Optional export quota	Total MSQ
	million kg butterfat				
PEI	3.034	0.050	0.062	0.100	3.246
N.S.	2.027	0.032	0.041	0.064	2.164
N.B.	2.114	0.035	0.043	0.070	2.262
Quebec	76.873	1.266	1.563	2.531	82.233
Ontario	50.033	0.827	1.017	1.653	53.530
Manitoba	6.257	0.103	0.127	0.206	6.693
Saskatchewan	4.164	0.069	0.085	0.137	4.455
Alberta	10.742	0.177	0.218	0.355	11.492
B.C.	4.956	0.082	0.101	0.163	5.302
Canada	160.200	2.641	3.257	5.279	171.377 (47.6 million hectolitres)

TABLE 3. A COMPARISON OF LEVY RATES 1982-83 AND 1983-84

	Producer levy rates, 1982-83 and 1983-84			
	August 1982	January 1983	Average 1982-83	August 1983-84
	$/hL			
Within quota				
Skim milk powder component	3.58	4.28	3.98	4.27
Special export program	0.51	0.67	0.60	0.87
Sleeve	0.31	0.19	0.24	-
Total in quota	4.40	5.14	4.82	5.14
Levy on class 1 sales	0.30	0.30	0.30	0.30
Overquota				
98 - 100%			24.20	28.54
Over 100%			27.95	31.79

These quota and levy rate structures were developed on the basis of projections of consumption trends, in recognition of support prices ($42.80/hL of industrial milk, $4.55/kg of butter and $2.72/kg of skim-milk powder) and estimated international prices for surplus dairy products. However, because there is some uncertainty over the real strength of consumption patterns for butter which seemed to emerge toward the end of the last dairy year, most of the provinces have resisted issuing all of the available quota to their producers. By effectively banking some quota, provinces will be able to issue more quota in January if consumption trends are verified. If consumption does not increase as forecast, then those provinces withholding quota can avoid giving producers false signals and can also avoid having to cut quotas during the year. Moreover dairy authorities in each province have agreed to pay the CDC $28.54 per hectolitre for production in the province for utilization between 98% and 100% of provincial MSQ. In order to obtain sufficient funds, the provincial authorities are tending to retain 1% to 2% of provincial MSQ to individual producers. In this way they ensure sufficient levy revenue to meet their financial obligations.

Most recent data for August and September of this dairy year indicate that total industrial milk production is down 11.1% over the year-earlier period. Fluid milk production is up 2.1% and total milk production is down 6.7%. Those figures are, however, somewhat misleading since milk production during the same period last year was unusually high and, in fact, led to the large accumulations of butter stocks which still exist today.

Consumption

During the 1983-84 dairy year, the consumption of milk and dairy products will be influenced by a wide range of factors. Along with a forecast rate of unemployment of 11% or higher will be changes in the price of milk and dairy products and their substitutes, changes in consumer incomes and tastes as well as long- term population trends and levels of advertising.

Prices

Dairy product prices, whether they be fluid milk regulated at the provincial level or industrial milk product regulated at the federal level, are by and large determined on the basis of cost of production formulas. As a consequence, the rather significant price increases observed during the past months in the feed grain markets will be reflected in these formulas, and since dairy producers are scheduled to emerge from the 6 and 5 restraint program on March 31, 1984, dairy product prices should increase, possibly sharply. It is expected that for the entire year, industrial milk price increases could be in the area of 6-7%.

At the fluid milk level, some provinces, notably Ontario and Quebec, have not implemented producer price increases since the fourth quarter of 1982 and are unlikely to implement price adjustments until the first quarter of 1984. This reluctance to increase prices has arisen not only from the general slackening of inflation in 1983 but also from the recognition that price increases do have a dampening effect on consumer demand.

As increased input costs percolate through the system during the year, butter prices will increase. These increases will confirm the trend of the past 8 years, during which time the price of butter has doubled while the price of margarine, its major substitute, has increased by about one-third. The effect of these differing rates of price change has been to widen the price difference between butter and margarine to record levels ($1.42/lb). While, as noted, butter prices will increase in 1984 because of increased input costs, the price of margarine should also increase because edible oil prices have doubled since last August, thus implying that the relative price difference between butter and margarine, although still high, may marginally decline.

Income

As real disposable income increases, one would expect the consumption of higher quality, more expensive goods to increase. Therefore, with a forecast increase in real disposable income of 2.5%, one would expect the consumption of dairy products to increase both in the home and in meals consumed away from the home. As real disposable income increases, the expenditure on food away from home also increases. Total out-of-home expenditures in Canada currently represent one-third of all food dollars spent. Canadians spend about $9 billion on meals away from the home, with dairy products representing some $1.3 billion or 14% of that total. At the product level, it is estimated that 45-50% of total butter consumption is consumed away from the home. Recently observed trends in the restaurant trade seem to indicate that more and more restauranteurs, in an effort to cut costs, are substituting margarine for butter where possible. They, like other consumers, are reacting to the wide price differentials between butter and margerine. As a consequence, the potential positive impacts of an increase in disposable income may be somewhat diminished.

Population

Another factor influencing the consumption of milk and dairy products relates to relative changes in population. The marketing section of the Ontario Milk Marketing Board has as its target group the population segment between the ages of 12 and 29. This group consumes 41% of milk volume but makes up only 31% of the population. However, as the inevitable aging of this baby boom bulge continues, the size of this 12-29 age group will become proportionately smaller. As a

population ages, its consumption of milk declines. As an example, the 30-49 year age group, although they account for 27% of the population, consumes only 17% of the total volume of milk consumed. Similarly, as the age profile of a population increases, consumers appear to become increasingly fat-conscious. They choose to reduce fat intake, consume lower-fat products and consume less of high-fat content products, all for health reasons. Clearly, the impacts of population changes will be long-term in nature; however, their significance should not be underestimated, and their impact on demand will be downward during the coming decade.

Advertising

In 1978, dairy producers, with the assistance of the federal government, launched the first national generic advertising campaign in support of butter since the introduction of margarine into Canada in 1949. Since 1978, advertising has become a major marketing tool for the entire dairy industry. The edible oils industry, in response to increased levels of butter advertising, have increased their marketing activities in order to increase margarine's share of the market.

For the current dairy year, it is expected that the promotional activities of the margarine industry and the beverage industries (beer, soft drinks) will significantly increase. At the same time, the dairy sector will probably maintain their current expenditures. Therefore, if advertising has the anticipated impact on consumer tastes and preferences, it can be expected that the dairy industry as a whole will lose ground to its competitors.

FORECAST 1983-84

MILK PRODUCTION

As a consequence of the rather conservative approach being taken by the CMSMC in increasing MSQ and by the provinces in issuing that quota and because of high overproduction penalties, it is forecast that total farm sales of industrial milk and cream will decline by about 1.9% to 48.00 million hectolitres during the dairy year 1983-84. At the same time, total farm sales of fluid milk will decline to 25.51 million hectolitres, a decrease of 0.6%. In total, farm sales of milk and cream in Canada will decline about 1.6% to a level of 73.51 million hectolitres.

PRODUCTION OF DAIRY PRODUCTS

At the product level, cheddar cheese production for the dairy year will decrease by 3000 t to a level of 94 000 t. This decrease will be the result of the very high cheddar stocks currently held by the industry. As less milk is expected to be used for cheddar production,

more milk will be utilized in butter production. Consequently, despite reductions in total milk production, butter production will remain unchanged from last year at about 111 000 t. Specialty cheeses will continue to reflect strong demand and production will increase nearly 4% to a level of about 83 000 t. It is expected that there will be a slight decrease in concentrated whole milk production to about the 135 000 kL range. Similarly, the production of skim-milk powder is expected to increase marginally and will probably achieve a production level of 140 000 t.

CONSUMPTION OF MILK AND DAIRY PRODUCTS

Overall demand during August and September 1983 indicates that national requirements have increased 5%. Such an increase, while not significant for the year as a whole, could be the stimulus required to prompt provincial marketing boards to release more quota from their individual quota banks. Such a release would please not only the producers, but also the processing sector, in as much as increased quota utilization means more milk to process, which could in turn help alleviate some of the seasonal milk shortage problems currently facing the processing sector. It should be noted, however, that such an increase is not likely to be maintained and that national requirements for the year as a whole will probably not change dramatically from 1982-83 levels.

Because of high relative prices, reduced relative advertising expenditures and continued high unemployment, butter consumption will probably reach about 107 000 t in 1983-84, more or less unchanged from the year-earlier period. If consumption and production are unchanged, it is likely that stock levels of butter will end the year at about 37 000 t, unless the CDC is able to increase exports during the year. Cheddar consumption similarly will not show significant changes, although there could be room for a slight decrease as consumers react to high prices and continue to develop a taste for variety cheeses. Consumer preference for variety cheeses will result in an overall increase of about 3% or more. The domestic consumption of skim-milk powder and concentrated whole milk, although showing great data variability from year to year probably as a result of lags in the reporting of exports or stocks, does not seem subject to such fluctuations and is actually quite consistent, with evaporated milk experiencing an annual 6%-8% decline. Therefore, it is predicted that the consumption of these products will follow their long established patterns.

DAIRY POLICY ISSUES 1984

During the coming months, the dairy industry will have to address a number of issues of particular relevance to the sector.

As of August 1, 1983, the support price for industrial milk products, (butter and skim milk powder) increased to $4.55/kg (+ $0.13) and $2.72/kg (+ $0.07) respectively. These increases result in a Target Returns level of $42.80/hL, as influenced by the returns adjustment formula and by the federal government's 6 and 5 restraint program. It is expected that a further price increase (effective January 1) will be the last increase under the current 6 and 5 program. Effective March 31, 1984, dairy producers are scheduled to emerge from the 6 and 5 world (with the processing sector emerging 1 year later on March 31, 1985). It is also expected that the industry will seek either revisions to the returns adjustment formula or the implementation of an entirely new formula which, in their eyes, will more adequately reflect their changing cost structures.

B.C. non-participation in the National Milk Marketing Plan will continue to be a problem for the industry. As long as B.C. continues to act responsibly outside the Plan and holds production under control, then the current status quo can be maintained; however, if B.C. allows its producers to move more toward provincial milk self-sufficiency, thereby displacing milk from other provinces, then the plan could come under considerable strain. Discussions at the CMSMC level are continuing however, it does not now appear that the CMSMC will be able to bring B.C. back into the Plan and it is unlikely that a solution to this problem will become apparent in the short term.

Cheese import quotas will continue to be of concern to the sector, with continuing requests for the reduction of import quotas. Currently import quotas total 20.4 million kg, about 60% of which comes from the EEC.

The deterioration of the international market for dairy products will continue to be a concern as huge American and European stocks continue to build and as competition on international markets between the U.S. and the EEC continues to have severe impacts on world prices and market availability. These concerns could have an impact on producer levy rates as the disposal of surplus dairy products and whole milk products under quota becomes more difficult.

INTERNATIONAL SITUATION

Despite unfavorable weather conditions in 1983, world milk production should climb by slightly more than 1.5% from a year earlier, when a 2% increase was recorded. In 1984, production should continue to rise, though less than in previous years, and could even level off. Because of the problems caused by dairy product surpluses in the past two years, various producing countries adopted measures in 1983 to slow the growth of milk production in the short run. However, given the ever-widening gap between supply and demand, the impact of these measures is not expected to be felt until 1984. Although world consumption trends are difficult to forecast precisely, demand is

expected to remain sluggish despite the economic recovery and intensive efforts by various governments to bolster consumption in 1983. Such stagnant demand is largely the result of continuing high unemployment in most developed countries, the severe impact of the economic recession on major importing countries, and consumer attitudes about fat content. Although it is risky making precise forecasts for 1984, an increase in demand of over 1% is anticipated. Increased government spending on support programs, a decline in real prices of dairy products, growing per capita income and a larger population all point to improved demand next year. Despite this feeling of optimism, production in 1984 is expected to increase more quickly than existing market demand.

Because of a growing imbalance between world supply and demand and an unfavorable international market situation, world stocks of dairy products will, in all likelihood, continue to expand through the final quarters of 1983. If our supply and demand forecasts for 1984 prove accurate, stocks should remain fairly high, but increases should not be as large as in 1982 or 1983. In the area of international trade, the short-term outlook calls for only little improvement until the end of the year, because of sagging foreign markets. The deterioration of international trade can be attributed mainly to the continuing financial difficulties of several importing countries, to the decline in revenue of oil-exporting countries, to improved production in the USSR and East-European countries, and finally, to international food aid programs, which some countries are using extensively to dispose of their short-term surpluses. It is unlikely that international demand will be sufficient to absorb the projected increase in world production in 1984, despite intense price competition between various producing countries. All indications are that the economic conditions which contributed to a decline in dairy product imports in 1983 will continue to prevail next year. As reflected in the market situation, international prices should therefore continue to weaken over the final quarters of this year. In 1984, the trend should continue, but at a slower pace.

UNITED STATES

Even though a record number of cull cows were slaughtered in the United States in 1983, mainly as a result of increased feed prices and a freeze in support prices, American milk production should nevertheless show an increase of 1.5%-2% for the year. A high rate of replacement and a projected productivity gain of about 1.5% in 1983 are partly responsible for this situation. Even though the dairy herd is expected to decline slightly between January 1 and July 1, 1984 by close to 100 000 head, production could increase by about 1% in 1984. Because of higher dairy ration costs forecast for 1984, which will improve farm management and livestock breeding quality, productivity can be expected to rise. Any efficiency gains should therefore more than offset the decline in production resulting from herd reduction.

Nevertheless, considering the latest developments in American dairy policy, production could in fact peak in 1984, and in the opinion of some analysts, even show a 2% decline. In November, the US Senate voted on a new dairy program, which, if implemented, could drastically alter the situation in 1984. The main points of this program are as follows:

- a new levy of $0.50/cwt on the support price of milk, currently set at $13.10/cwt.

- a third levy of $0.50/cwt on the support price of milk, if CCC purchases exceed 5 million pounds of milk equivalent during the first twelve months.

- a diversion payment of $10/cwt to producers cutting their output 5%-30%, based on the historical period October 1, 1982-September 30, 1983 or on production averages from the 1980-81 and 1981-82 fiscal years.

- finally, a levy of $0.15/cwt of milk to finance a dairy promotion and research program.

Current consumption trends for butter, cheese and skim-milk powder should continue until the end of 1983 without any significant change. Even though per capita cheese consumption rose sharply in the first eight months of the year, there is nothing to indicate that this trend will be maintained next year. The increase in cheese consumption is attributed to government aid programs for the disadvantaged. While demand is expected to remain stagnant in 1983, because of continuing high unemployment and low disposable income, an upward trend in 1984 could result in an increase in consumption of about 2% next year. This projection is based on a possible reduction in the support price and the start-up of the dairy products promotional program. Finally, reflecting the interaction between supply and demand, stocks should continue their upward trend through the last three months of the year. The present figures speak for themselves. On October 15, 1983, intervention stocks of butter, cheese and skim-milk powder totaled 176 000 t, 405 600 t and 608 900 t respectively. Stocks of cheese and skim-milk powder have therefore risen by 12% and 14% respectively from the same date last year, while butter stocks have fallen 3%. In the area, CCC purchases in 1983 could exceed 7 500 000 t of milk equivalent, up 13% from a year earlier. Given the improvement in consumption, the extension of various national programs for disposal of surpluses, and the ratification of various international aid agreements with several countries in 1983, stocks should not expand greatly in 1984, but should nevertheless remain high.

EUROPEAN ECONOMIC COMMUNITY

EEC milk production should show an increase of slightly over 2% for the year. This situation may be attributed to two main factors, namely, the increase in the dairy herd from 1982, and improved yields

per cow as a result of the supply of cheap feed grains stored in 1982. Nevertheless, in 1984, the rate of production growth could begin to show. This slackening is explained by factors such as higher grain and oilseed price in recent months, the deterioration of the international market, and an increasingly evident political determination to lower the exorbitant operating cost of the dairy program. With regard to the latest developments on the future of the common dairy policy, the European Commission recently adopted the following resolutions:

- an "additional" holdback corresponding to 75% of the target price be levied on all manufacturers.

- the holdback be applied to all quantities exceeding by 1% the quantities marketed during the 1981 calendar year.

- the holdback be implemented effective January 1, 1984.

- a "special" holdback corresponding to 4% of the target price, also be levied, but apply directly to all producers.

- only farmers producing 60 000 kg of milk per year or 15 000 kg of milk per year per hectare be suject to this holdback.

The various European parliaments are to decide on these measures before the end of the year.

The consumption of dairy products should show a slight increase of about 0.5% for the year, mainly as a result of various consumption support programs. The disposal of surpluses on the domestic market, combined with the economic recovery and the decline in real prices of dairy products, could produce a strenghtening of demand in 1984. This will depend, however, on decisions taken to lower the operating costs of the dairy program. With the slump in exports of dairy products and increased production, stocks reached alarming levels in 1983. As of September 29, 1983, intervention stocks of butter and skim-milk powder totaled 614 500 t and 1 044 000 t respectively. In 1984, however, stocks should remain within more acceptable limits, depending on upcoming policy decisions to restrain stock expansion.

AUSTRALIA AND NEW ZEALAND

Because of the limited data available, it is difficult to establish any projections for countries in the southern hemisphere. In Australia, production in the 1982-83 dairy year was up by 4.8% from 1981-82. Butter and skim-milk powder production was particularly affected, rising 15.6% and 15.1% respectively. At the end of the dairy year, stocks of butter reached over 22 000 t, and stocks of the various kinds of milk powder totaled over 15 000 t. Production in New Zealand climbed 2% from the previous dairy year, mainly as a result of the increased herd and very favorable calving conditions.

TABLE 4. FARM AND COMMERCIAL SALES OF MILK AND CREAM IN CANADA, DAIRY YEARS 1980-81 TO 1983-84

	Dairy years		Forecast	Difference
	1981-82 (ML)	1982-83 (ML)	1983-84 (ML)	(%)
Farm sales[1]				
Fluid purposes	2619.6	2565.7	2551.1	-0.6
Industrial milk	4618.9	4682.7	4595.6	-1.9
Industrial cream[3]	219.4	210.8	204.4	-3.0
Total industrial use	4838.3	4893.5	4800.0	-1.9
Total farm sales	7458.0	7459.2	7351.1	-1.6
Commercial sales				
Standard milk	947.3	895.4	816.0	-8.8
Low fat milk[2]	1594.7	1631.4	1655.4	+1.5
Fluid cream[3]	363.8	375.6	385.0	+2.6

[1]Milk sold off farms as reported by the first recipient
[2]Includes 2% milk, skim milk, chocolate milk and buttermilk
[3]In milk equivalent

TABLE 5. PRODUCTION AND DOMESTIC DISAPPEARANCE OF VARIOUS DAIRY PRODUCTS, DAIRY YEARS 1980-81 TO 1983-84

	Dairy years			August	August	Difference	Forecast
	1980-81 (kt)	1981-82 (kt)	1982-83 (kt)	1982 (kt)	1983 (kt)	(%)	1983-84 (kt)
Production							
Butter	104.46	120.65	111.17	10.95	9.03	-17.5	111.0
Cheddar	107.34	89.99	97.35	8.76	9.33	6.5	94.0
Specialty cheeses	72.97	79.41	80.40	6.80	7.64	12.4	83.0
Concentrated whole milk	169.64	139.73	166.72	15.48	8.36	-46.0	135.0
Skim-milk powder	119.60	156.97	137.01	16.41	12.12	-26.0	140.0
Domestic consumption							
Butter	107.16	107.11	109.41	9.03	7.36	-18.5	107.0
Cheddar	98.98	91.89	92.74	9.61	8.71	- 9.4	92.0
Specialty cheeses	92.34	97.25	99.69	8.52	8.91	4.5	103.0
Concentrated whole milk[1]	79.38	52.89	80.59	7.47	-	-	55.0
Skim-milk powder	50.40	57.60	45.60	7.62	-	-	45.0

[1]Thousands of kilolitres

TABLE 6. DISPOSITION IN TONNES AND PRICES OF CHEDDAR AND "OTHER" CHEESE SUPPLIES, CANADA, DAIRY YEARS 1980-81 TO 1983-84

	1980-81	1981-82	1982-83	Forecast 1983-84
Cheddar				
Stocks on August 1	39 245	44 278	38 067	39 615
Production	107 344	89 989	97 347	94 000
Imports	-	-	-	-
Total supply	146 589	134 267	135 414	133 615
Exports	3 331	4 314	3 055	3 500
Stocks on July 31	44 278	38 067	39 615	38 115
Domestic disappearance	98 980	97 886	92 744	92 000
Specialty cheeses				
Stocks on August 1	11 786	11 641	12 283	11 683
Production	72 970	79 406	80 400	83 000
Imports	19 748	19 159	19 738	19 748
Total supply	104 504	110 206	112 421	114 431
Exports	525	670	1 047	800
Stocks on July 31	11 641	12 283	11 683	10 631
Domestic disappearance	92 338	97 253	99 691	103 000
Domestic cheese consumption				
Cheddar	98 980	91 886	92 744	92 000
Specialty cheeses	92 338	97 253	99 691	103 000
Total	191 318	189 139	192 435	195 000
Belleville market ($/kg), white cheddar, first grade[1]	3.730	4.150	4.450	4.762

[1]price paid to cheese factories by wholesalers

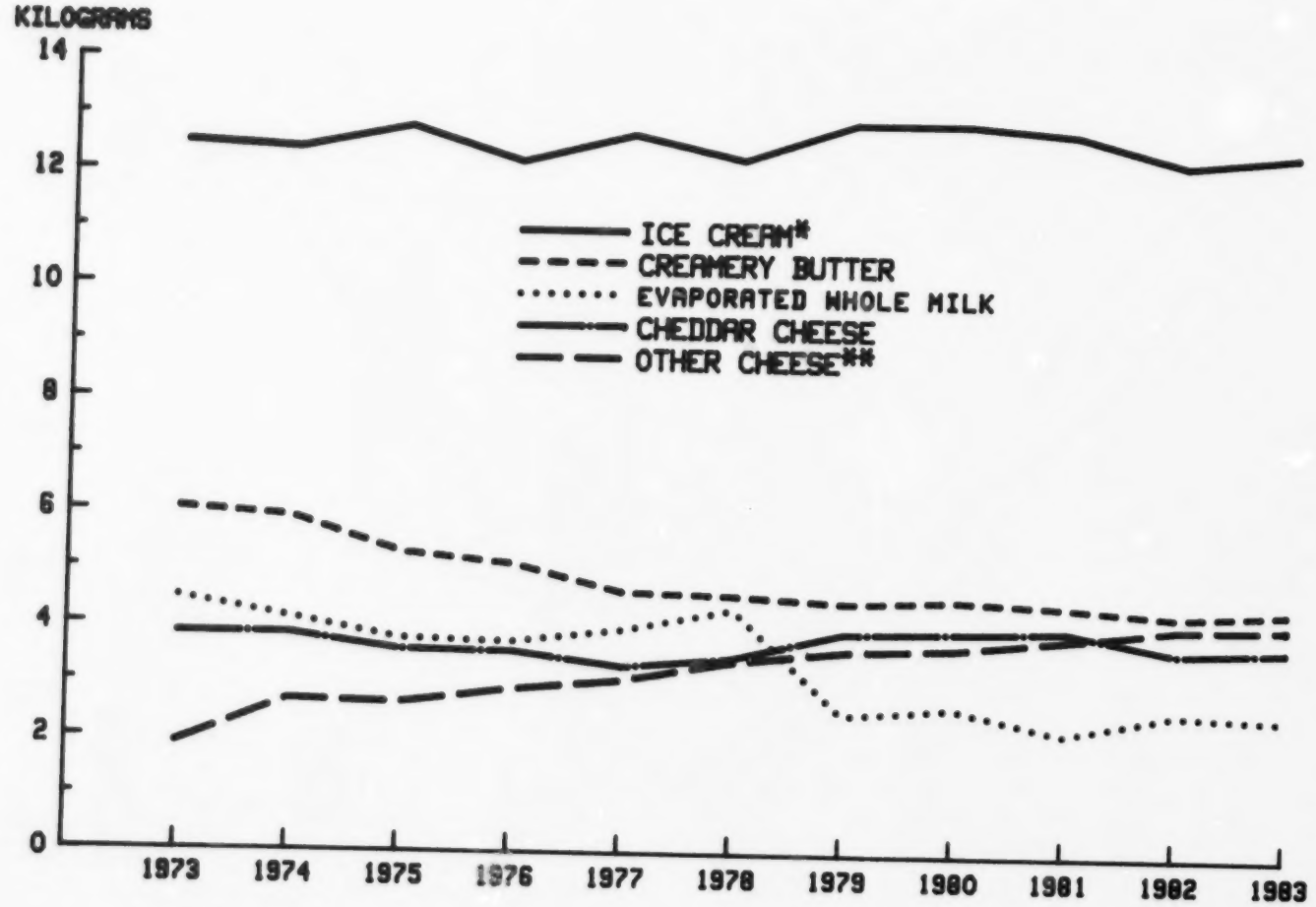
TABLE 7. BUTTER SUPPLIES IN TONNES, DISPOSITION AND PRICES, CANADA, DAIRY YEARS 1980-81 TO 1983-84

	1980-81	1981-82	1982-83	Forecast 1983-84
Butter				
Stocks on August 1	24 508	21 738	35 290	33 104
Production	104 456	120 650	111 173	111 000
Imports	32	47	39	-
Total supply	128 996	435	146 502	144 104
Exports	94	31	3 987	-
Stocks on July 31	21 738	35 290	33 104	37 164
Domestic consumption	107 164	107 114	109 411	107 000
Wholesale retail price at Montreal ($/kg), first-grade butter	3.574	3.965	4.281	4.58

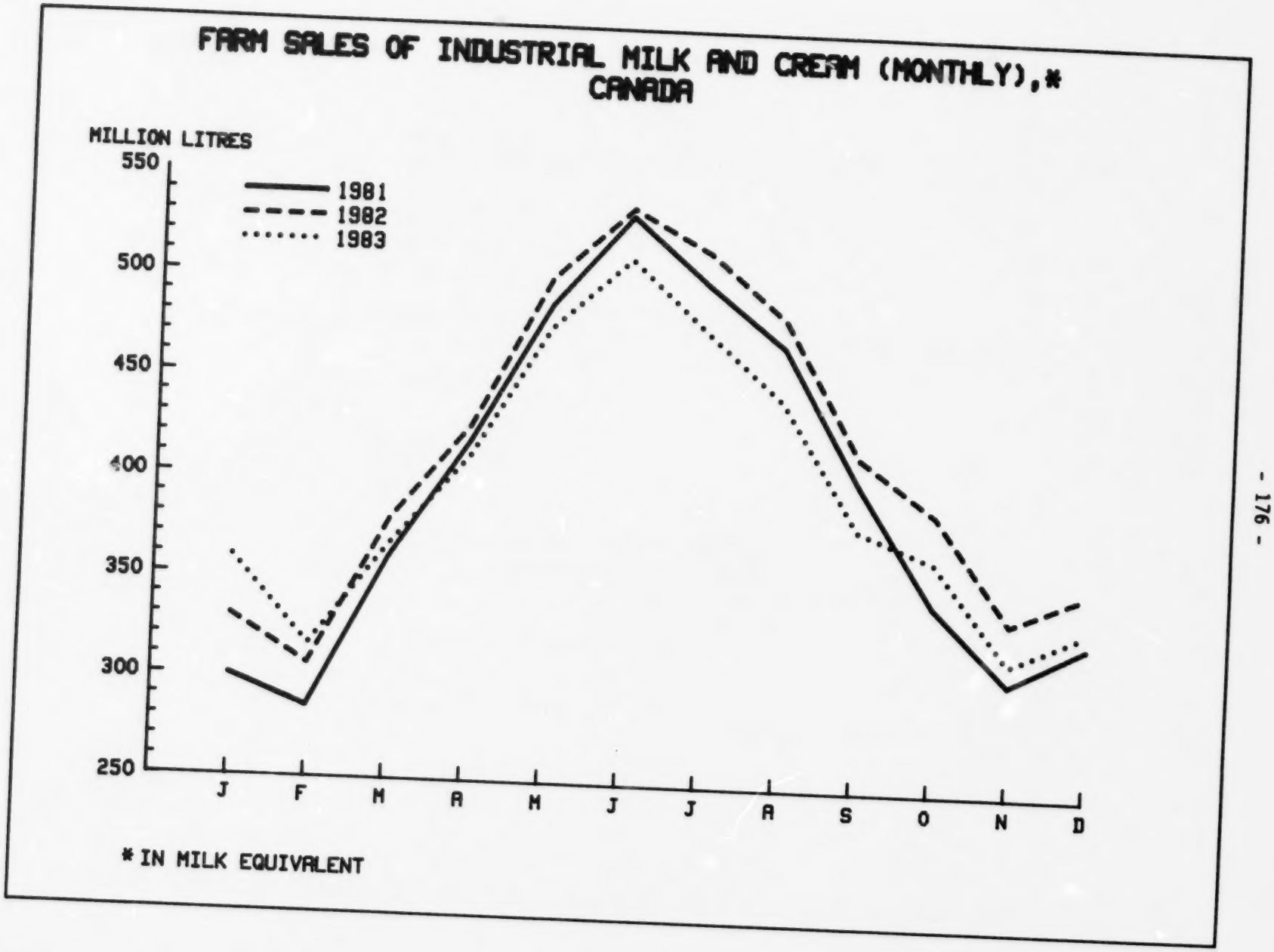
TABLE 8. CONCENTRATED WHOLE MILK AND SKIM MILK POWDER, DISPOSITION AND PRICES, CANADA, DAIRY YEARS 1980-81 TO 1983-84

	1980-81	1981-82	1982-83	Forecast 1983-84
Concentrated whole milk (kL)				
Stocks on August 1	31 276	30 686	24 537	24 269
Production	169 644	130 199	166 718	135 000
Imports	-	-	-	-
Total supply	200 920	160 885	191 255	159 269
Exports	90 602	93 552	86 393	80 000
Stocks on July 31	30 941	24 537	24 269	24 269
Domestic consumption	79 377	42 796	80 593	55 000
Wholesale prices at Montreal ($/case)	-	-	-	-
Skim milk powder (t)				
Stocks on August 1	38 189	43 499	60 844	23 507
Production	119 605	156 974	137 010	140 000
Imports	-	-	-	-
Total supply	157 794	200 473	197 854	163 507
Exports	63 892	82 033	126 751	85 000
Stocks on July 31	43 499	60 844	23 507	38 507
Domestic consumption	50 403	57 596	47 596	40 000
Wholesale prices at Montreal ($/kg), first-grade spray-dried powder	2.210	2.423	2.607	2.78

PER CAPITA DOMESTIC DISAPPEARANCE OF CERTAIN DAIRY PRODUCTS, CANADA, 1973 TO 1983



*LITRES
**WHOLE MILK CHEESE


FARM SALES OF INDUSTRIAL MILK AND CREAM (MONTHLY),*
CANADA
MILLION LITRES
550
500
450
400
350
300
250
1981
1982
1983
J
F
M
A
M
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S
O
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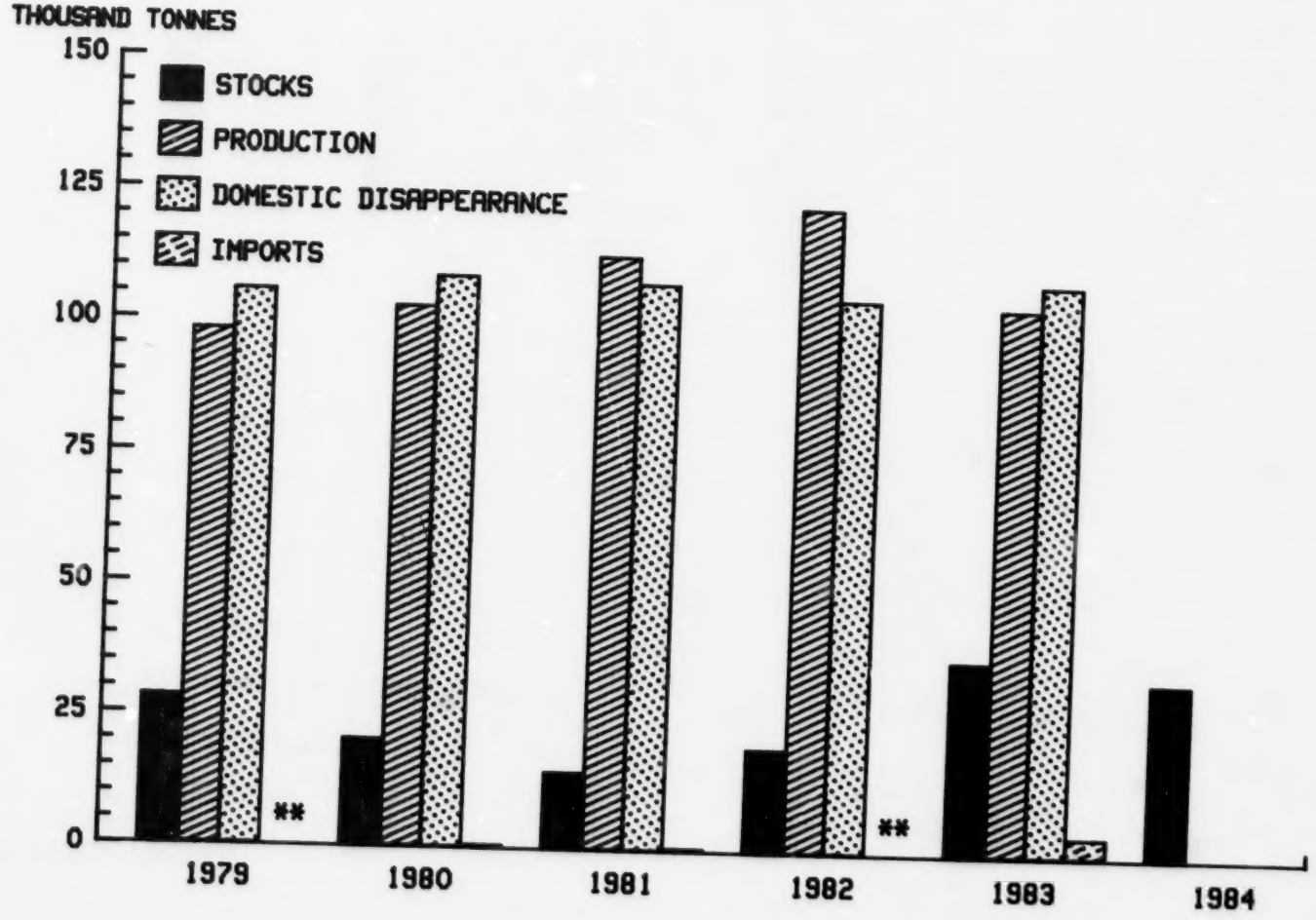
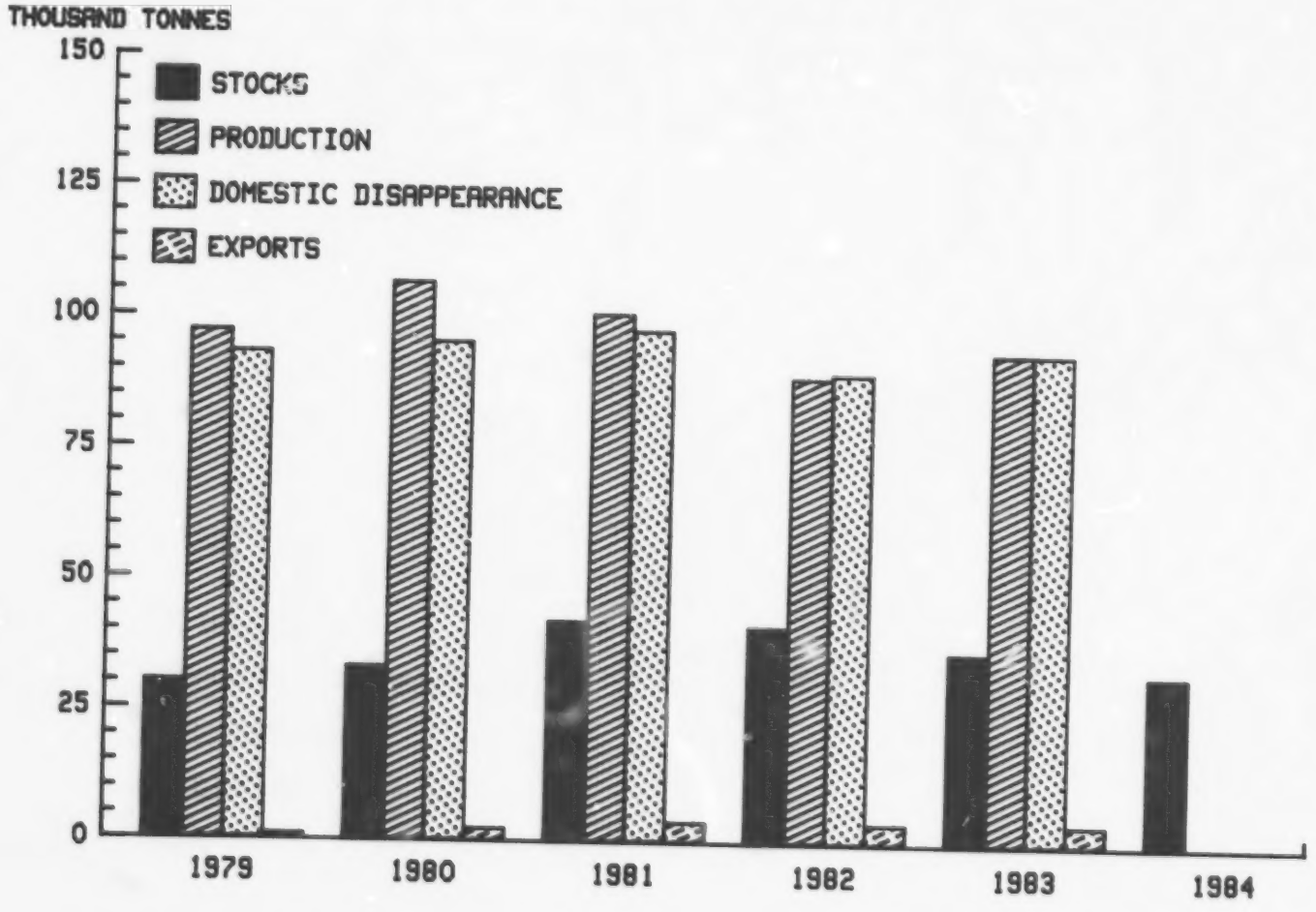
D
* IN MILK EQUIVALENT

STOCKS,* PRODUCTION, DOMESTIC DISAPPEARANCE AND IMPORTS OF CREAMERY BUTTER, CANADA, 1979 TO 1984



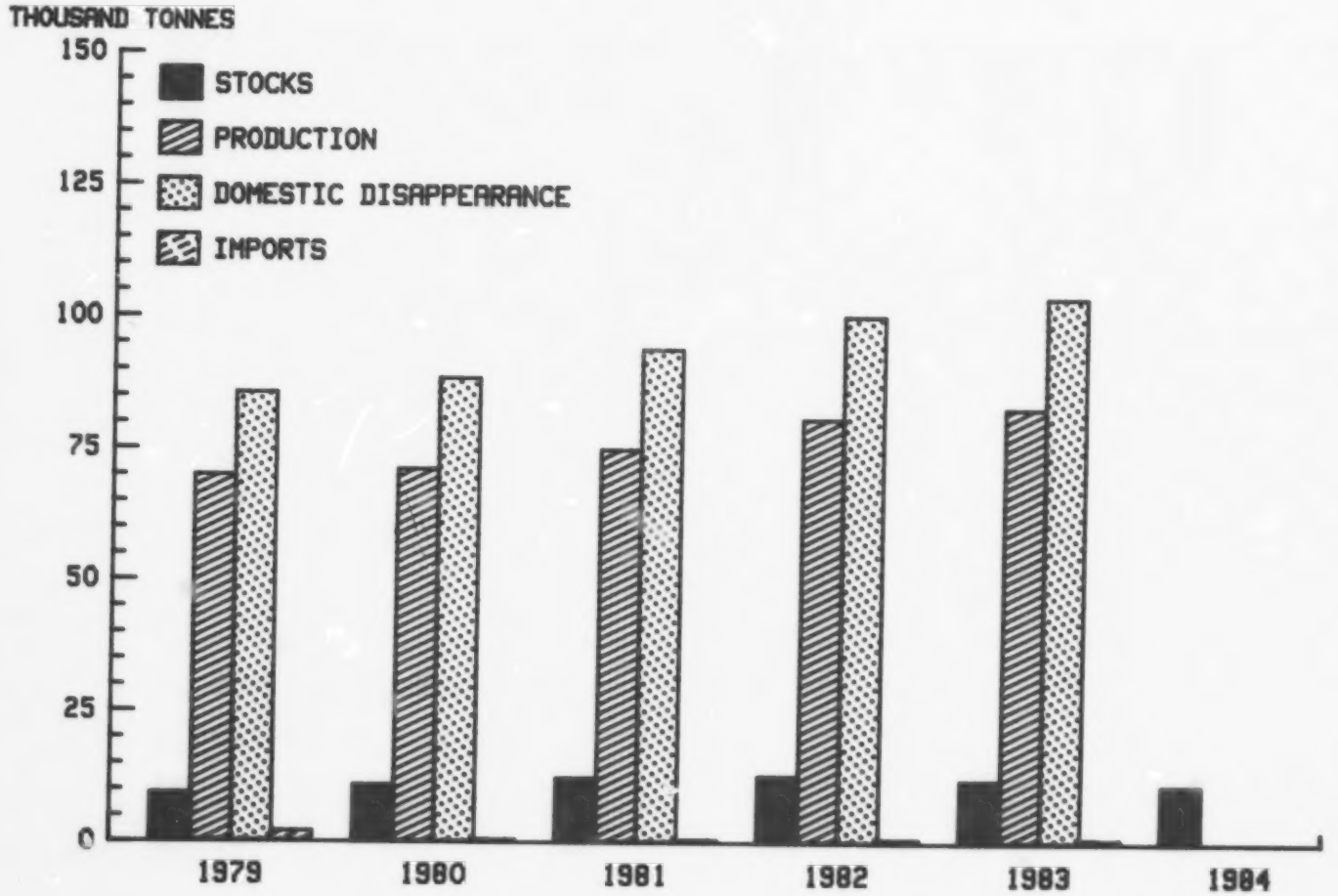
*JANUARY 1
**LESS THAN 50 tonnes

STOCKS,* PRODUCTION, DOMESTIC DISAPPEARRANCE AND EXPORTS OF CHEDDAR CHEESE, CANADA, 1979 TO 1984



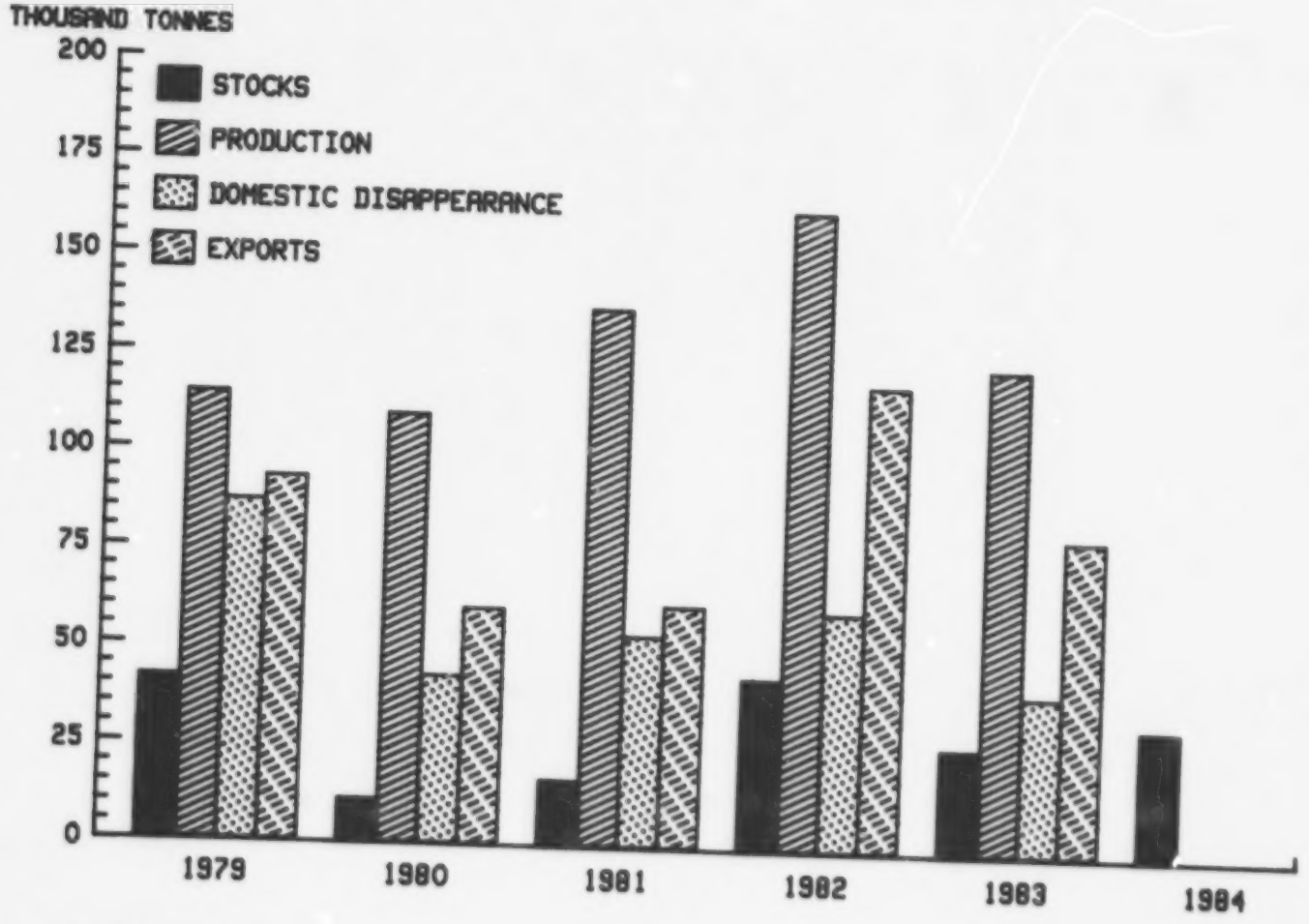
* JANUARY 1

STOCKS,* PRODUCTION, DOMESTIC DISAPPEARRANCE AND IMPORTS OF 'OTHER' CHEESE,** CANADA, 1979 TO 1984



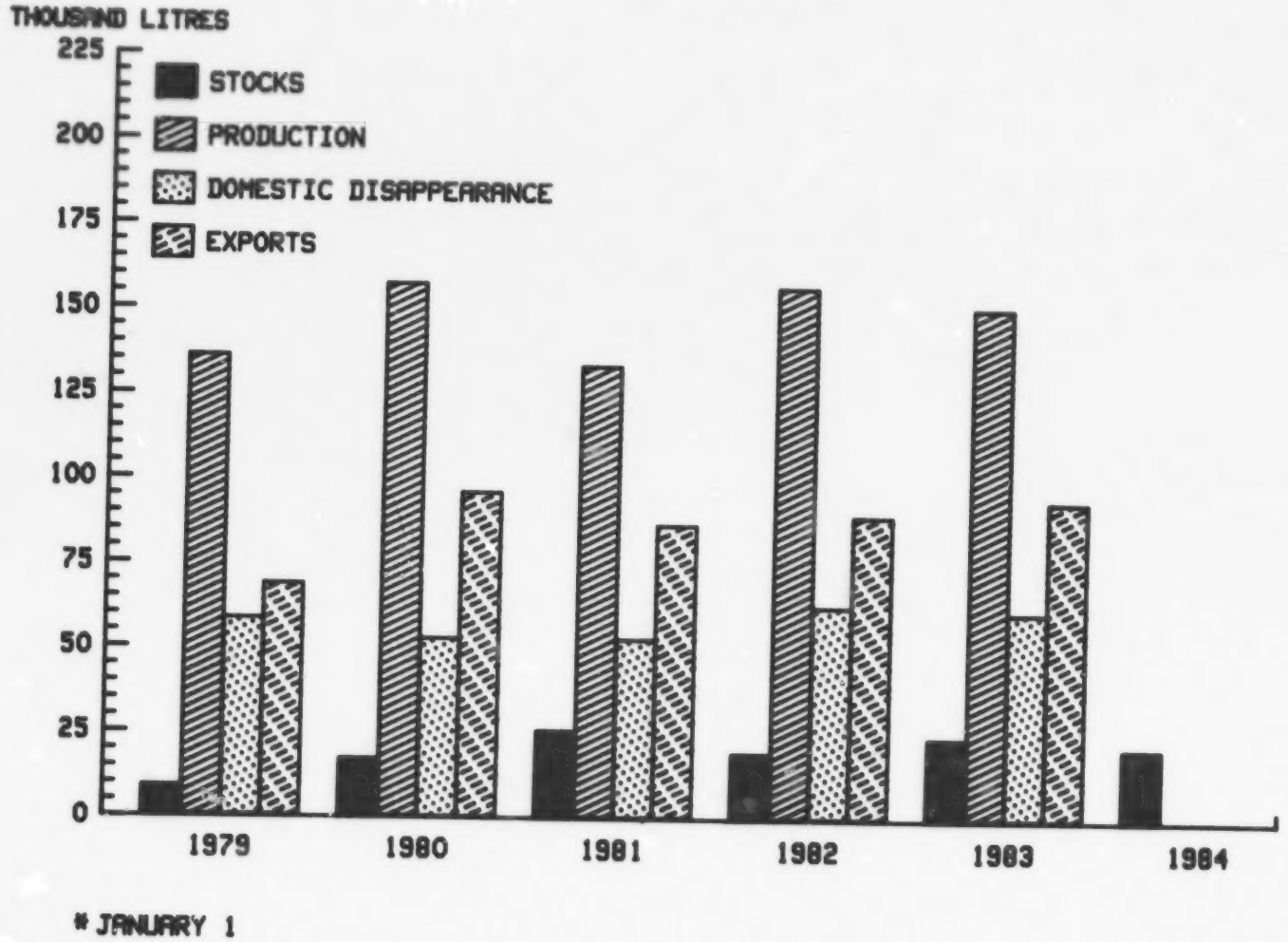
* JANUARY 1
**WHOLE MILK CHEESE

STOCKS,* PRODUCTION, DOMESTIC DISAPPEARRANCE AND EXPORTS OF SKIM MILK POWDER, CANADA 1979 TO 1984



* JANUARY 1

STOCKS,* PRODUCTION, DOMESTIC DISAPPEARANCE AND EXPORTS OF EVAPORATED WHOLE MILK, CANADA, 1979 TO 1984



* JANUARY 1

HORTICULTURE AND SPECIAL CROPS

HIGHLIGHTS

Total Canadian fruit production in 1983 was slightly above that of 1982 and exceeded the 1976-80 average. Nova Scotia's record blueberry crop more than offset a decline in blueberry production in Quebec and New Brunswick. Apple production in Ontario and Quebec continued to recover from the severe weather problems of two years ago. Retail prices for apples, despite a larger Canadian supply, were above the very depressed levels of last year. A smaller world supply of apples and stronger economic conditions should result in retail prices 10-15% above those of last year. Early season wholesale apple prices were up in all areas as the market recovered from the depressed pricing situation of a year ago. As a result of inventory increases from last year, frozen fruit prices, especially for raspberries and blueberries, are well below those of last year.

Major vegetable production in 1983 was below the record levels of 1982. Total Canadian potato production, at approximately 2550 thousand tonnes, is 9% below last year's crop of 2800 thousand tonnes but 3.2% above the 1976-80 5-year average. Onion and carrot production declined after reaching record levels in 1982. Stocks of storable fresh vegetables, while below those of last year, are certainly adequate. A decrease in Canadian potato production, combined with a 4.8% decrease in the U.S., resulted in early prices well above those of last year. With fresh vegetable supplies below those of last year, producer and consumer prices have escalated accordingly. As the marketing season progresses, price increases of 9-12% are expected. Retail prices for processed vegetables will increase only marginally despite smaller supplies and slightly lower inventories.

With lower interest rates, producers and processors will be under less pressure to sell their fresh and processed inventories. This should result in a uniform marketing program with product evenly distributed throughout the season. Consumers can be expected to increase their purchases of higher priced food items as the economy continues to improve.

Despite potato producer support in favor of a formal potato agency in eastern Canada, the National Farm Products Marketing Council has not been able to obtain task force support on the structure of such an agency.

Following an agreement with Japan on the technicalities of exporting sweet cherries from British Columbia to that country in 1982, a limited-volume commercial shipment was successfully marketed from the 1983 crop. Industry representatives anticipate that sales to Japan will increase in the next few years. Efforts to reach a similar agreement on the exportation of fresh apples from British Columbia to Japan will be made in the near future.

Sales of flowers and ornamentals improved in 1983, with an increase of approximately 18% over those of 1982. Prices will have increased about 7% with significant improvement in the volume of sales. In 1984 and 1985, sales increases will approach 4 and 5% respectively.

Nursery products also experienced a recovery in 1983. Sales will be approximately 11% above those of last year. Over the next two years, sales of nursery products are expected to increase 5 and 6% in 1984 and 1985 respectively. Prices will likely move up in the next few years at the same rate as the increase in sales volume.

Production contracts for special crops (dry beans, dry peas, lentils, fababeans, buckwheat, mustard seed and tobacco) are strongly influenced by export demand. With export demand depressed, production for some of these crops has decreased.

The long-run demand for pulse crops is positive, although export demand was weak in 1983 as a result of depressed world economic conditions. A number of high debt countries curtailed imports to conserve hard currencies to meet foreign loan obligations. Export prices could improve over the low 1982-83 level, since supplies from the 1983 crops are below those of a year earlier. Production in 1984 could increase about 10% overall.

Mustard seed area in 1984 is likely to increase as supplies are very tight and non-contract production prices are well above contracted prices.

Export demand for buckwheat is expected to improve, especially for lower quality product. However, market expansion will be destined for European countries. Our traditional high quality product destined for the Japanese market will remain fairly steady at 30 000 t per year. Hence, the planted area in 1984 could increase, mostly for the European market. Grower prices are not expected to improve.

World tobacco supplies in 1984 will be more than ample to meet estimated utilization. World cigarette consumption is under attack as a result of health concerns. As the world inflation level subsides, price increases will be less dramatic. As a result, demand may remain fairly constant and thus producer prices and volumes should experience more stability.

World sugar prices in 1983-84 are unlikely to increase because of the continued excess in world supply. The forecast closing stock-to-consumption ratio of 39.5% suggests a world free market price range of U.S. 12-22¢/kg.

Canadian sugar beet area in 1984 is expected to increase 3% as a result of an increased production target in Quebec. The Prairie area will remain steady. Wholesale prices are related to the world free market price of sugar. Hence, little improvement is foreseen in 1983 crop prices.

Canadian high fructose corn sweetener (HFCS) capacity will remain steady at 1983 capacity, but the three plants will now be operated under a new company, 70% controlled by the Canada Starch Company.

HFCS marketing margins will continue to be under pressure from higher corn costs and low sugar prices throughout 1984.

HORTICULTURE

R.W. Anderson

SITUATION

The total apple supply in the northern hemishere for the 1983-84 marketing year is approximately 1.9% below the 1978-82 5-year average. While down only marginally from the 5-year average, the 1983 crop represents a 14.3% decline from the record crop of 1982. As a result, prices are above the very depressed levels of a year earlier but still under pressure. With production continuing to recover in Quebec, prices will not improve as significantly as in other Canadian apple producing areas with respect to year-earlier prices. Prices for processing apples are up marginally over fall contract prices for the 1982 crop.

PRODUCTION

European apple production in 1983 is estimated to be 21% below that of last year and 4.2% below the average for the 1978-82 period, because of dry growing conditions which reduced apple size. Production of the variety Granny Smith is increasing rapidly in the U.S. in an effort to meet the demand for green varieties. Canada's climate is not very suitable for this apple.

COMPARISON OF APPLE PRODUCTION BY REGION AND COUNTRY

Area	1983[1] crop as a percentage of 1982 crop	1983[1] crop as a percentage of 1981 crop	1983[1] crop as a percentage of 1978-82 average
Northern hemisphere	85.7	117.8	98.0
Europe	79.1	123.8	95.8
North America[2]	101.4	108.1	102.6
U.S.	102.1	106.8	102.4
Canada	101.0	114.2	103.0

[1]preliminary
[2]Includes Mexico

Canadian and U.S. production, while below the record 1980 crop, is above that of previous years. Mexican production, while slightly below that of last year, remains above average. Growing conditions were good in British Columbia and the western U.S.; thus production was above average in those areas. Quebec orchards continue to recover from the severe winter of 1980-81, and the 1983 crop, while not a record, will be close to that experienced before the severe winter. Production in Ontario and other eastern provinces will be above average, although the size of the individual fruit is below average.

EXPORTS AND IMPORTS

Early fresh apple exports for the new marketing season to November 4, 1983 were up 50.4% from those of the corresponding period in 1982, but well below those from the large 1980 crop. In recent years Canada has become less dependent on the U.S. and more dependent on the Far East and western Europe for export markets. Sales to export markets from the 1982 crop during the first 7 months of 1983 decreased 13.8%. Major export volume changes occurred in Indonesia, Netherlands, Norway, the U.K. and the U.S. where sales decreased after increasing the previous year, since regular supply sources for these countries had larger crops. Exports to France increased marginally last year despite a larger European crop. Taiwan and Malaysia increased their purchases very significantly during the early part of 1983. Sales of processing apples were also up because of excessive fresh market supplies.

During 1982-83, fresh apple imports were 29.4% below the relatively large volume of 1981-82 but 22.6% above the 5-year (1976-80) average. Most of the decrease in imports occurred as a result of a recovery in production in the province of Quebec. From August 1 to November 4, 1983 unloads of imported fresh apples to 12 major cities in Canada were 2.2% below those of a year ago. The U.S. is a major source of apples and for the first 7 months of 1983 accounted for more than 50.8% of Canadian imports. Volume in the first 7 months of 1983 was approximately 23% below that of the previous year as a result of Canada's improved 1982 crop. Chile, South Africa, New Zealand and France continue to market some of the variety Granny Smith in Canada. Volume from New Zealand during the first 7 months was up by 9524 t over the year-earlier volume. Competition for the domestic product comes mostly from U.S. apples, especially the varieties Red and Golden Delicious.

UTILIZATION

Despite a relatively large crop in eastern Canada in 1982, processor utilization decreased 17.3% from that of the previous year when supplies were limited. Utilization in Canada was 14.8% below the 5-year average. As of July 1, 1983 stocks of solid pack and apple-sauce were 17.3% above previous-year levels in Canada. Apple juice

stocks as of August 1 were down 27.9% in Canada, with Ontario processors holding a greatly reduced inventory compared to last year. In the U.S., juice and sliced apple inventories were down while that of applesauce was up from year-earlier levels as of August 1, 1983. This situation weakened the contract prices in the U.S. for processing the 1983 crop. As of November 1, total Canadian storage holdings of fresh apples were less than 1% above those of the same date in 1982 but 14.6% below those from the record 1980 crop. Controlled atmosphere holdings are 6.1% below year-earlier levels. Expansion of controlled atmosphere storage facilities and research results which specified the conditions necessary for maintaining apple freshness have allowed the apple marketing season to be extended.

PRICES

Early season prices for the 1983 crop in Ontario and Quebec were above those of a year earlier despite slightly larger supplies. Wholesale prices in Montreal for McIntosh were approximately 26% above those for the large 1982 crop. Prices for fresh apples during the summer were showing some strength in response to concern over a smaller European crop and drought conditions in various parts of North America.

Early Michigan and Ontario prices for processing apples are only marginally different from the low prices of a year ago. Michigan prices for peelers ranged from U.S. 14.3-18.7¢/kg, compared to 13.75-19.25¢/kg in 1982. These prices remain well above the 11-14.4¢/kg range for the large 1980 crop. Juice apple prices are U.S. 10¢/kg in Michigan versus 9.35¢/kg last year. In Ontario early fall peeler prices for apples delivered in supplied bins were 17.6-19.3¢/kg compared with 14.3-24.3¢/kg in 1982. Ontario juice prices were approximately 11¢/kg, versus 8.8¢/kg for early juice apples from the 1982 crop. Slightly smaller orange juice inventories may contribute some strength to the juice market, since retail specials for orange juice have been limited in recent weeks. Offsetting the lower orange juice inventory is an estimate for orange production in Florida which suggests an increase of 20% over the year-earlier crop.

OUTLOOK

While not a record crop, the 1983 North American apple crop is above the 1978-82 5-year average, and this, combined with a slightly below average international apple crop, will result in a fairly difficult marketing season. Exports will meet strong competition, although competing apples will be smaller as a result of poorer growing conditions in Europe. Slightly stronger prices in Europe should reduce the volume of apples marketed by France in Canada.

If the cold storage crop can move to market without causing depressed prices, the controlled atmosphere storage season should encounter an improved price situation of 10-15% over that of a year ago. Volume

will be heavy throughout the marketing season with prices responding accordingly. Sales of McIntosh apples will be an early season problem because of their lack of size and variable maturity.

Processed apple product (sauce, juice, etc.) imports will be similar to the low levels of recent marketing seasons. If the Canadian dollar maintains its current value, imports of apple concentrate may increase. World offerings of low-priced apple juice concentrate will, however, increase as exporting nations look for foreign exchange.

In 1983-84, fresh apple exports to the U.S. will be similar to the low levels of last year. Sales to Europe will likely increase marginally as will sales to the Mid and Far East. Quebec and Ontario will import some fresh and processing apples from nearby states such as New York. Imports from the State of Washington will also be a major factor in the next few months.

Fresh market prices will be similar throughout Canada and will be higher than for the 1982 crop. The greatest increase will occur in Ontario and Quebec. Import prices will be higher and will provide some strength to domestic products. Processed apple product prices may strengthen if economic conditions improve and demand picks up. If above-average orange production materializes, apple juice prices may weaken during the winter.

World apple production potential continues to be such that large crops are expected for the next few years. Many countries had large crops in 1983 despite less than ideal growing conditions. This means that given very good conditions, surplus supplies and low prices will result.

TENDER TREE FRUIT

SITUATION

Production

Tender tree fruit (apricot, cherry, peach, pear, plum and prune) production in 1983 is estimated to be well above the 1982 crop but slightly below the 1976-80 average. Cherry production in Ontario was similar to that of last year. Sour cherry sales were down 9% from those of 1982 but sweet cherry sales for processing were up. Fresh peach production was up in both British Columbia and Ontario. Ontario had a slight decline in processing peach production. Pear production is up marginally in all major producing areas.

In the U.S., tender fruit production decreased as dry weather conditions caused a 6.1% decline. A mild winter helped growing conditions in the eastern United States. U.S. pear production in 1983 is expected to be 1.4% below 1982 but 11.5% below that of 1981.

Utilization

In 1982-83, imports of fresh tender fruit were 21% below those of the previous year and 7.4% lower than the 5-year average. In 1982-83 processed tender fruit imports were 8.4% below year-earlier levels, with canned peaches accounting for 72.6% of the total import volume. Australia continues to experience some surplus problems with canned fruit and their prices have been well below average. Canadian exports of fresh tender fruit are relatively limited and continue to decline as the domestic market absorbs most of peak period production.

Processor use of tender fruit in 1982 increased 7.2% from year-earlier levels but was 24.2% below the 5-year average. A larger crop in 1982 increased the processing volume available for all commodities. In general, supplies of fruit for processing have been on the decline in recent years. Only three firms, two in British Columbia and one in Ontario, now process peaches in Canada. Canned tender fruit carryover as of July 1, 1983 was 3.5% above the 1982 level and 36.9% above the 5-year average. Increased retail prices and increased consumer interest in fresh fruit have resulted in a diminishing demand for canned fruit. Economic conditions in recent months have also contributed to a decline in demand and a buildup in inventory.

November 1 cold storage holdings of winter pears were down 29.7% while early November wholesale prices were below those of a year earlier. Holdings in British Columbia were up, while holdings in Ontario were well below average. In Ontario, the variety Kieffer is no longer being processed and thus was not reflected in November storage holdings. U.S. pear supplies are up and prices down.

Prices

With Canadian production of tender fruit crops up and a larger crop in the U.S., prices for processing fruit were mixed. A Canadian sour cherry crop slightly below that of last year resulted in an increase in Ontario producer price from 53¢/kg in 1982 to $1.06/kg in 1983. The price of sweet cherries for brine was up 30.2%. Producer price changes for processing fruit in Ontario ranged from a decline of 13.3% for Bartlett pears to a 100% increase for sour cherries for freezing. Peach and plum prices were similar to year-earlier levels. Increased yields for most crops will assist producers in meeting higher costs despite only marginally higher prices. Fresh market prices were down significantly. Wholesale prices for B.C. Bartlett pears are down 8-19% in major western Canadian cities. As a result of a larger U.S. and Canadian peach crop, Ontario fresh peach prices decreased by 21.7%.

Outlook

Despite an increase in the domestic production of tender fruit in Canada, fresh fruit imports will increase throughout the year. Production in 1984 will continue to increase for most crops as a

number of new plantings mature. Import prices will rise moderately, reflecting increased marketing costs. Canned tender fruit price increases will be moderate as competition from Australian and American imports continues. A large volume of canned pears in B.C. may necessitate some government assistance. Consumers will likely continue to look favorably to fresh produce and reduce their purchases of processed product. Frozen fruit prices will remain similar to those of last year or decline slightly. Sour cherry prices are likely to increase as the frozen season progresses.

Fresh tender fruit prices in 1984 are expected to increase marginally with above average production. One exception will be sour cherry prices which may decline if a large crop materializes. Exchange rates and transportation costs will both assist domestic prices. Demand for domestic fresh tender fruit is not expected to grow as a result of increased alternatives such as nectarines, seedless grapes, cantaloupes and kiwi fruit. Given a wide range of commodities available for extended periods of time, consumers appear less inclined to shift to seasonal products just because they are produced domestically.

GRAPES AND BERRIES

SITUATION

Total production of grapes and berries (blueberries, raspberries, and strawberries) increased from 138.9 thousand tonnes in 1982 to approximately 150 thousand tonnes in 1983. Grape production at approximately 80 522 t was up slightly from 74 118 t in 1982 but well above the 5-year average. Ideal growing conditions in Nova Scotia resulted in a record crop of approximately 8848 t of lowbush blueberries in that province and a record Canadian lowbush blueberry crop. Raspberry production for processing in British Columbia increased 17% as a number of new plantings reached maturity and weather conditions were ideal. Unlike last year, a large inventory reduced demand and marketing problems were encountered for the 1983 raspberry crop. Mechanical harvesting has increased significantly in B.C., where over 90% of Canada's raspberries are produced. Demand for raspberry products has leveled off in the past year largely as a result of economic conditions; less expensive cherries are the main substitute product.

A ready labor supply in Nova Scotia enabled the province to harvest the record blueberry crop. Quebec's blueberry crop declined as pickers reacted to lower prices by not picking in the bush. Newfoundland had a smaller harvest of blueberries since the area is the last to harvest, and prices reflected a surplus situation. Strawberry production in 1983 was disappointing in a number of areas. A cold spring reduced berry size while hot weather limited the length of the season. Government regulations on the registration of farm labor reduced the available labor for major strawberry producers. A number of "pick your own" strawberry operations had surplus berries, as hot weather and a short season discouraged buyers. Processed strawberry harvesting

experiments in Ontario indicated that harvesting and decapping can be done mechanically. British Columbia's processed strawberry crop at approximately 7983 t was up 3.9% over that of the previous year.

Grape production in British Columbia decreased approximately 5.5% from that of 1982 while Ontario's production was up approximately 8.6%. Inventories of both red and white wine are more manageable this year. Sales of Canadian wine were 51% of total sales last year versus 48.6% the previous year. White wine sales continue to increase while demand for red wine is declining. Agriculture Canada's Agriculture Products Board purchased approximately 680 t of grapes from the 1983 Ontario crop for sale to brandy manufacturers. The Board also purchased 158 t of strawberries for processing. Most processed strawberries have been sold. Processors in B.C. were able to use the surplus grapes in that province. Brandy production and quality increased in 1983. Unusually high sugar levels have resulted in a sugar premium for 1983 crop grapes used in brandy production. Efforts by Canadian grape producers to sell top quality grapes to home wine producers continued in 1983. More vinifera and French hybrid varieties are being offered to these markets.

Exports and imports

Total fresh grape and berry exports for the 1982-83 marketing year increased 91.2% from those of a year earlier and were 83.5% above the 5-year 1976-80 average. Raspberry exports were up significantly as U.S. demand and a small inventory resulted in heavy sales. Frozen blueberry exports in 1982-83 were 18.1% ahead of the previous year's level. Demand in Europe and Japan while slightly weaker resulted in a significant volume moving offshore. Some inventory carryover and buyer reluctance has resulted in lower initial sales of 1983 crop to Europe. Improved production techniques and mechanical harvesting in Nova Scotia have provided the regular supply of fruit necessary for a consistent export program.

Imports of fresh grapes and berries increased 13.8% from year-earlier levels and were 14.5% above the 5-year (1976-80) average. Grape and strawberry imports were the largest, with grape imports once again on the rise. Heavy imports just prior to the Canadian domestic season continue to put pressure on returns to Canadian producers. Early season sales normally bring premium returns but when the domestic crop is marketed imports have tended to capture the early market. Canadian producers must budget and market with this in mind and not anticipate a period of premium prices.

Utilization

In 1982, the volume of grapes and berries processed increased 10.1%. Higher blueberry and raspberry production accounted for the upswing in processing of these crops. Strawberry processing continues to increase as varieties and equipment conducive to mechanical harvesting

are improved. Agriculture Canada, through the New Crop Development Program, is helping to develop new processing strawberry production and harvesting techniques for specific growing conditions.

Demand for both raspberries and blueberries weakened over the past year. Most raspberry exports are to the U.S., where demand declined in 1983 because of economic conditions and greater domestic product. Highbush blueberry production in British Columbia was down marginally in 1983 while both highbush and lowbush production is increasing in Ontario. Domestic blueberry demand remains firm and could perhaps be improved by means of a promotion program.

Concord grape production is gradually declining. As a result, fewer surplus problems are being encountered and producers are able to market the crop with less difficulty than in previous years. Producers have been encouraged to switch to other varieties, and are in fact doing so.

Stocks of major frozen berries on October 1, 1983 were up 27.5% in the U.S.; blueberry and strawberry holdings increased the most. U.S. frozen raspberry holdings increased only 4%. Canadian stocks of frozen blueberries are above year-earlier levels.

Prices

In 1983, farm prices of most fresh and processing grapes and berries declined compared to those of a year earlier. In British Columbia, early estimates of raspberry prices for processing were 94¢/kg, versus $1.87/kg a year earlier. This decline resulted from a slowdown in demand and a buildup in inventory. In the Maritimes, prices of lowbush blueberries for processing decreased to about 90¢/kg compared with $1.32/kg in 1982. This decline in price reflects slower sales in Europe and a significant increase in supplies. In Ontario, fresh strawberry prices decreased slightly from $1.35/kg in 1982 to $1.32/kg in 1983. Ontario strawberries for processing were 40¢/kg in 1983 versus 70¢/kg in 1982. In British Columbia, strawberries sold to processors averaged $1.36/kg versus $1.32/kg in 1982. Ontario processing grapes were one of the few commodities which experienced a price increase in 1983. Class 1 (Concord & Fredonia type grapes) posted a 1% increase while class 9B (specific vinifera varieties) showed a 7.2% increase. Fresh grape prices decreased 15% in Ontario. In British Columbia, the price of white grapes for wine making increased approximately 6.5% over 1982. Ontario's fresh grape New Crop Development program continued in 1983 and a quantity of fresh grapes were sold at the retail level. British Columbia's cranberry production is about 5% above that of the previous year, with prices slightly above those of 1982. Nova Scotia also increased cranberry production with an increase in volume of about 2.4% and a price increase of about 7.1% above year-earlier levels. One large producer in Nova Scotia has introduced an early variety which matures by Thanksgiving and increased fresh sales as a result.

OUTLOOK

Lowbush blueberry sales may approach year-earlier levels but prices will be well below those of last year. Production in Nova Scotia is expected to increase in 1984 since growing conditions were very good this past summer and producers are utilizing improved technology. Highbush blueberry production and sales will also increase, especially in Ontario, where the volume has been limited to date, and there is an interest in pick your own operations. Raspberry inventories are likely to be burdensome for the next year or two. A government purchase program may be necessary for the large inventory of raspberries. New plantings will increase production in British Columbia. Two new products, a raspberry concentrate and a raspberry-blueberry pie for fast food services, will increase sales of the commodities involved. Blueberry and raspberry sales may increase this coming year at the expense of higher priced cherries. Strawberry production in 1984 should increase if labor problems can be overcome and if the plants in drought areas have not been set back too drastically during this past summer. Cranberry production in British Columbia and Nova Scotia is expected to increase in 1984.

European wine production in 1983-84 will likely decline as a result of a smaller grape crop, although quality may be above average. Canada's demand for white wine will continue to expand, although likely by less than the 15.3% experienced in 1983 as price increases exert pressure on the sector. Varieties used for red wine production, such as de Chaunac and Foch, will continue to be in surplus on the market. Sales of these varieties for home wine making will facilitate their marketing.

Imports of most kinds of fruit, especially fresh and processed strawberries and fresh table grapes, will continue to increase in 1983-84. Most of the increase will occur at times when domestic product is unavailable. Price increases in 1983 for imported and domestic fresh products will be marginal, as supplies are expected to be ample and economic conditions such that any increase in demand will be limited.

POTATOES

SITUATION

Production

Early estimates of the 1983 potato crop area indicate that, at 112 748 ha, it would be slightly less than the area planted for the record 1979 crop. In terms of production, 2550 thousand tonnes are expected in 1983, compared with 2800 thousand in 1982, a decrease of 9%. A similar situation occurred in the U.S., where an estimate of the area of fall crop to be harvested indicated a decrease from 440 thousand hectares in 1982 to 426 thousand hectares in 1983. The U.S. fall

potato crop is estimated to be 4.8% below that of 1982. Some production areas in both countries have reported a smaller proportion of large potatoes.

COMPARISON OF FALL POTATO PRODUCTION IN THE U.S. AND CANADA

Country	1983[1] crop as a percentage of the 1982 crop	1983[1] crop as a percentage of the 1981 crop	1983[1] crop as a percentage of the 1978-82 average
U.S.	95.2	99.0	98.1
Canada	91.1	95.1	96.4

[1]Preliminary

Exports and imports

Canadian exports of table and seed potatoes in 1982 were approximately 20% below year-earlier levels. This decrease resulted from a large crop in most countries and high cullage in Canada. Sales to Central America and the eastern U.S. continue to be a major factor for the industry. Potato exports from August 1 to November 14, 1983 totaled 117 007 t, compared with 93 669 t in 1982. This increase in exports reflects a smaller world supply. Phytosanitary concerns have initially resulted in the rejection of Canada's request to sell seed potatoes from the 1983 crop to Italy and Greece. Special permission had been received on a year-by-year basis and may yet be granted for the current year.

Total 1982 imports were 29.7% below those of 1981, but 36.3% below the 5-year average. In 1983, early imports from the western U.S. were at a level similar to that of last year as large supplies of the smaller "stripper" (non size A) potatoes were available from the state of Washington at low prices. This volume has created problems for B.C. producers, where an anti-dumping investigation against the U.S. has been initiated.

Maritime potato sales to the eastern states are currently encountering the threat of additional duties. Many shippers must post bonds so that if current investigations by the U.S. government reveal injury resulting from dumping by Canadian potato shippers, funds for additional duties will have already been collected. With the market in eastern Canada and the eastern U.S. much stronger this year, the threat of additional duties has not hampered sales. Potato trade between Canada and the United States is substantial despite current problems relative to the dumping of potatoes.

Utilization

Early estimates of the potato volume processed in 1982-83 indicate an increase from the previous year's level. Potato supply was up and processors were more inclined to build up inventories as the cost of keeping them declined. As a result, inventories were close to or slightly above average at the start of the 1983-84 season. As of November 1, 1983, Canadian storage holdings of fresh potatoes were 1937 thousand tonnes, down 9.3% from year-earlier levels but less than 1% above the 5-year average.

Prices

Potato prices in early 1983 were relatively strong compared to the very depressed year-earlier levels. In early November, bulk prices to PEI growers were 14.3¢/kg versus 5.7¢/kg a year ago. Imports of "stripper" potatoes from the state of Washington limited the improvement in B.C. potato prices relative to those of a year earlier. Despite some featuring of potatoes by retail chains at 30-35¢/kg in Ontario and Quebec, producer prices remained fairly stable in October.

Processed potato contract prices, which are established before the growing season, were generally 1-5% below year-earlier levels in Canada. U.S. contract price decreases ranged from 2 to 7% with all areas reporting difficult negotiations. Ontario farm contract prices for french fries in October 1983 were set by arbitration at approximately $98/t versus $111/t for the 1982 crop. Minor adjustments for size and quality may cause some variation in this price. Processor inventory in the U.S. is slightly larger than that on hand at this time last year.

OUTLOOK

Domestic potato consumption will likely decrease slightly because prices are higher and supplies lower than those of last year. With improvements in economic conditions, fresh market sales may decline somewhat as more people eat away from home. Processed potato consumption should improve accordingly. Prices for both processing and fresh potatoes will increase as the marketing season progresses. Inventory levels may increase marginally during the early part of the season but should decline towards the spring of 1984. Thus with greater demand, the contracted area for processing in 1984 should increase and prices should also rise.

Fresh potato imports in the 1983-84 marketing year will exceed those of last year. Exports will increase since world supplies are lower than last year. Table potato exports to the eastern U.S. will find a strong market as the season progresses.

Seed potato inquiries and orders have already been received from a number of countries that do not usually buy from Canada. This reflects a stronger demand than experienced last year when potatoes

were in surplus. As a result, seed exports could approach or exceed last year's levels despite the possible loss of sales to Italy and Greece.

Producers are expected to increase their potato area in 1984. A year of stronger prices, combined with the need to improve revenue after several years of low returns, will prompt increased plantings. If alternative crops, such as grains, continue to increase in price, the increase in potato area will be dampened.

OTHER VEGETABLES

SITUATION

Production

Major 1983 vegetable production (including greenhouse vegetables and mushrooms, but excluding potatoes) is estimated to be significantly below record 1982 levels. Onion, cabbage and carrot production is significantly lower. Processing yields are down in many areas and the area planted is well below that of last year. Mushroom, greenhouse cucumber and tomato production was, in contrast, higher than last year. Canned vegetable supplies are slightly lower than last year, with the exception of canned tomatoes, tomato juice, tomato paste, asparagus and wax beans, which are higher. Growing conditions were very dry in parts of Ontario and Quebec, so that processing volume in these areas was down significantly. Other areas had average production and processing conditions. Production of frozen vegetables in 1983 was also down, partly as a result of less seeded area and partly because of adverse production conditions.

For the second year in a row, asparagus production was limited by a very cool spring. Tomatoes were late because of a cool spring, but hot dry summer conditions resulted in a top quality product. Overall tomato volume was down, however.

Greenhouse cucumber production in 1982 was 2% above that of 1981 and 31.2% above that of the 5-year average for 1976-80. The introduction of seedless cucumbers in the greenhouse industry significantly reduced the decline in cucumber production. Greenhouse tomato production in 1982 was slightly above that of 1981, but 2.9% below the 1976-80 5-year average. Relatively poor returns to tomato producers have discouraged any expansion plans. In 1983, competition from field tomatoes was limited and market conditions for the greenhouse product much stronger.

Storage holdings of carrots, onions, cabbage, and rutabagas are well below the record levels of last year. As of November 1, 1983 holdings of cabbages were down 21%, rutabagas 31%, onions 21%, and carrots 28%. While lower than last year, these holdings are above average since new storage facilities allow producers the option of uniformly marketing

their product. U.S. processed vegetable production for major commodities in 1983 was down from last year, as was the production of fresh vegetables. U.S. tomato production for processing decreased approximately 4% as a result of adverse growing conditions in California. Since both Canada and the United States have smaller tomato crops, it is expected that burdensome inventories will be reduced.

Exports and imports

Exports of fresh vegetables increased in 1982-83, up 21% from 1981-82, because of lower prices and burdensome supplies. Carrot and onion exports to the eastern U.S. continue to increase as Canadian product becomes more competitive in terms of quality, packaging and availability. Increased storage facilities in Canada means that producers can guarantee consistent supply and quality over the life of the marketing period.

Total canned vegetable exports fell 7.3% from year-earlier levels, but were 21.6% above the 5-year average. Exports of corn and green and wax beans accounted for the decrease. The 1982-83 exports of frozen vegetables were 24.5 million kilograms, approximately 3.8% above that of last year's record high of 23.6 million. A favorable exchange rate and a quality Canadian product have resulted in the continued export of large volumes of frozen vegetables.

Imports of fresh vegetables decreased 3.6% from year-earlier levels. A marginal increase in peas, mushrooms, corn, carrots and asparagus was more than offset by decreases in all other vegetables. Domestic fresh mushroom production increased, despite price pressure as facilities in the process of being constructed during the past years came into production. As a result of poorer market conditions, the building of new facilities has been curtailed and the industry is entering a period of limited growth. One large firm in Quebec, however, is planning some further expansion. Canned mushroom imports declined very slightly in response to stress on the Canadian market. Other canned vegetable imports decreased 19.8% in 1982-83 over those of a year earlier. Most of the decrease was in canned tomatoes where large domestic inventories maintained pressure on the market. Frozen vegetable imports were down approximately 17.4% compared to previous years.

Utilization

The total volume of vegetables processed in 1983 is below that of 1982. Reduced area and erratic growing conditions contributed to the decrease. Inventories of canned vegetables as of July 1, 1983 were 36% above year-earlier levels and 13.7% above the 5-year average. Canned tomato juice stocks were up 41.3% after increasing significantly last year. Canned tomato stocks were well above year-earlier levels. The cost of keeping inventories has declined with lower interest rates and, as a result, processors may be inclined to allow some build-up.

As of October 1, 1983, frozen vegetable stocks in Canada were above year-earlier levels. Inventories of U.S. frozen vegetables as of October 1, 1983 were down 2% and demand was moderate. Canned vegetable holdings were down slightly in the U.S. with prices edging upwards.

Prices

With production below year-earlier levels, 1983 prices are significantly above those of last year. After extremely low prices in 1982, onion prices have rebounded the most dramatically. A surtax program was necessary and stabilization is being considered for onions in 1982. Storage vegetables prices were sufficiently depressed in 1982 that a stabilization program has been requested for each of them. Cabbage, rutabaga and carrot prices for the 1983 crop have all posted significant increases. The fruit and vegetable Consumer Price Index (CPI) rose 3.4% between September 1982 and September 1983. For fresh vegetables alone, the CPI increased 19.4%. Fresh vegetable prices have risen over the past year as supplies varied in response to weather conditions. Processed vegetable prices as reflected by the CPI have been increasing and are 3.5% above year-earlier levels. Price increases were tempered this year because marketing costs, including labor, packaging and energy, all had limited increases. A continuation of lower interest rates will favor inventory retention.

Greenhouse tomato producer prices in Ontario were $1.72/kg for the 1983 spring crop versus $1.54/kg in 1982. Greenhouse cucumber producer prices in Ontario were $6.62/doz in 1983 versus $5.34/doz in 1982.

For most Canadian vegetables, higher inventories and lower product demand resulted in contract price decreases. Ontario contract prices ranged from no change to a decrease of approximately 3%. U.S. contract prices were similar to or lower than those of last year.

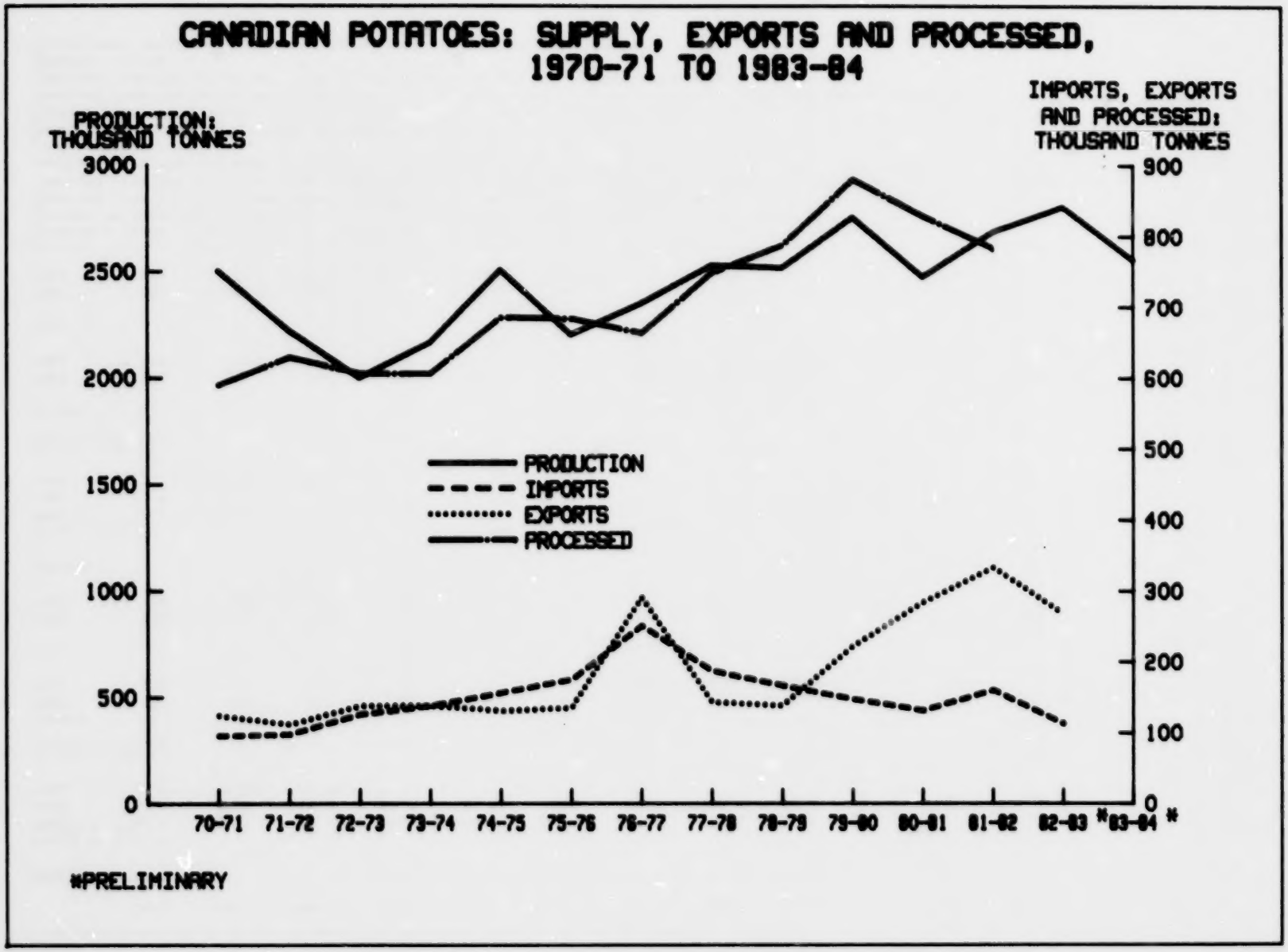
OUTLOOK

Supplies of fresh vegetables in the U.S. are expected to be ample in 1984 as producers respond to slightly higher prices. Processed vegetable prices will be up slightly from those of 1983 despite lower inventories. Producer prices for storable Canadian vegetables will remain significantly above those of last year and increase as the season progresses. Wholesale and retail prices will increase, but will be limited by supplies from the U.S. winter crops. Exports of canned product are likely to increase marginally because of Europe's smaller 1983 supplies. Fresh mushroom sales may increase as the economy improves throughout the year.

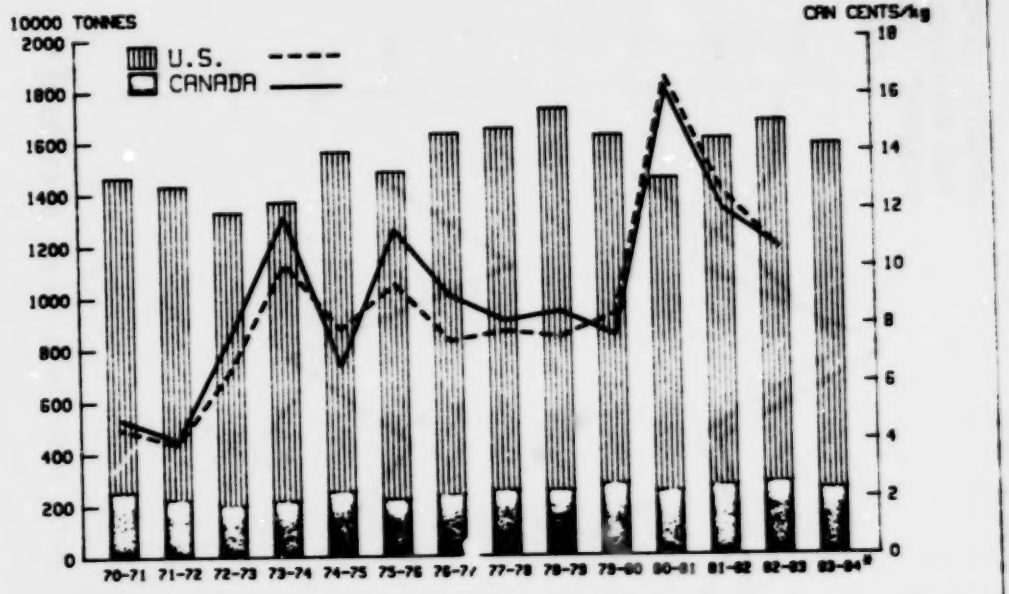
FRESH APPLES AND POTATOES: MONTHLY WHOLESALE PRICES[1] AT TORONTO, AND STOCKS[2] IN CANADA AND U.S., 1982 TO 1984

	Jan.	Feb.	March	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
APPLES												
Price (¢/kg)[3]												
1982	82.0	104.4	96.8[4]	95.8[4]	104.3[4]	111.5[5]	117.6[5]	115.5[5]	55.4	43.6	47.9	48.8
1983	47.2	49.9	61.9[4]	57.7	63.0	100.3[5]	99.1[5]	112.9[5]	74.8	61.0	(60.0)	(61.0)
1984	(63.0)	(67.0)	(68.0)									
Stocks ('000 t)												
Canada												
1982	192	152	113	75	45	31[7]	N/A	N/A	N/A	N/A	284	259
1983	214	175	136	92	57	43[7]	N/A	N/A	N/A	N/A	286	
U.S.												
1982	1 214	965	748	508	342[8]	195[8]	121	N/A	N/A	680	2 015[8]	1 745[8]
1983	1 398	1 105	862	600	391	194	98	31	5	794		
POTATOES												
Price (¢/kg)[6]												
1982	18.2	19.3	18.1	16.6	17.1	21.6	23.7[5]	21.5[5]	18.3[5]	15.0	14.9	14.9
1983	14.9	14.7	15.2	22.6	24.8	21.3	33.6[5]	39.0[5]	27.1[5]	26.0	(24.8)	(25.0)
1984	(26.5)	(27.0)	(28.0)									
Stocks ('000 t)												
Canada												
1982	1 598	1 346	1 163	886	613	N/A	N/A	N/A	N/A	N/A	2 136	1 941
1983	1 657	1 444	1 228	935	655	N/A	N/A	N/A	N/A	N/A	1 937	
U.S.												
1982	7 402	6 220	5 048	3 714	2 298	N/A	N/A	N/A	N/A	N/A	N/A	9 152
1983	7 870	6 575	5 284	3 849	2 400	N/A	N/A	N/A	N/A	N/A	N/A	

[1] Simple average of mid-points of weekly price ranges at Toronto. Forecasts are shown in brackets.
[2] Stocks on first day of the month. For U.S. potatoes, total stocks in 15 fall production states
[3] Derived from the price per bushel (19.05 kg) of Ontario fancy McIntosh apples or, for the summer substitute, derived from the price per tray pack (19.05 kg) of Washington extra fancy Golden Delicious controlled atmosphere apples, size 100, without allowing for the disparity due to the change, in summer, to a different grade, variety and package.
[4] Mostly, or wholly, controlled atmosphere apples
[5] Summer substitute price, in effect while regular series is not available
[6] Derived from the price per 22.68 kg of P.E.I. Canada No. 1 white potatoes or, for the summer substitute, derived from the price per 22.68 kg of Ontario Canada No. 1 white potatoes
[7] Mid-May stocks
[8] Calculated estimate, based on International Apple Institute stocks


CANADIAN POTATOES: SUPPLY, EXPORTS AND PROCESSED,
1970-71 TO 1983-84
PRODUCTION:
THOUSAND TONNES
IMPORTS, EXPORTS
AND PROCESSED:
THOUSAND TONNES
3000
2500
2000
1500
1000
500
0
900
800
700
600
500
400
300
200
100
0
PRODUCTION
IMPORTS
EXPORTS
PROCESSED
70-71
71-72
72-73
73-74
74-75
75-76
76-77
77-78
78-79
79-80
80-81
81-82
82-83
*83-84 *
#PRELIMINARY

FALL POTATOES: PRODUCTION AND AVERAGE FARM PRICE, 1970-71 TO 1983-84

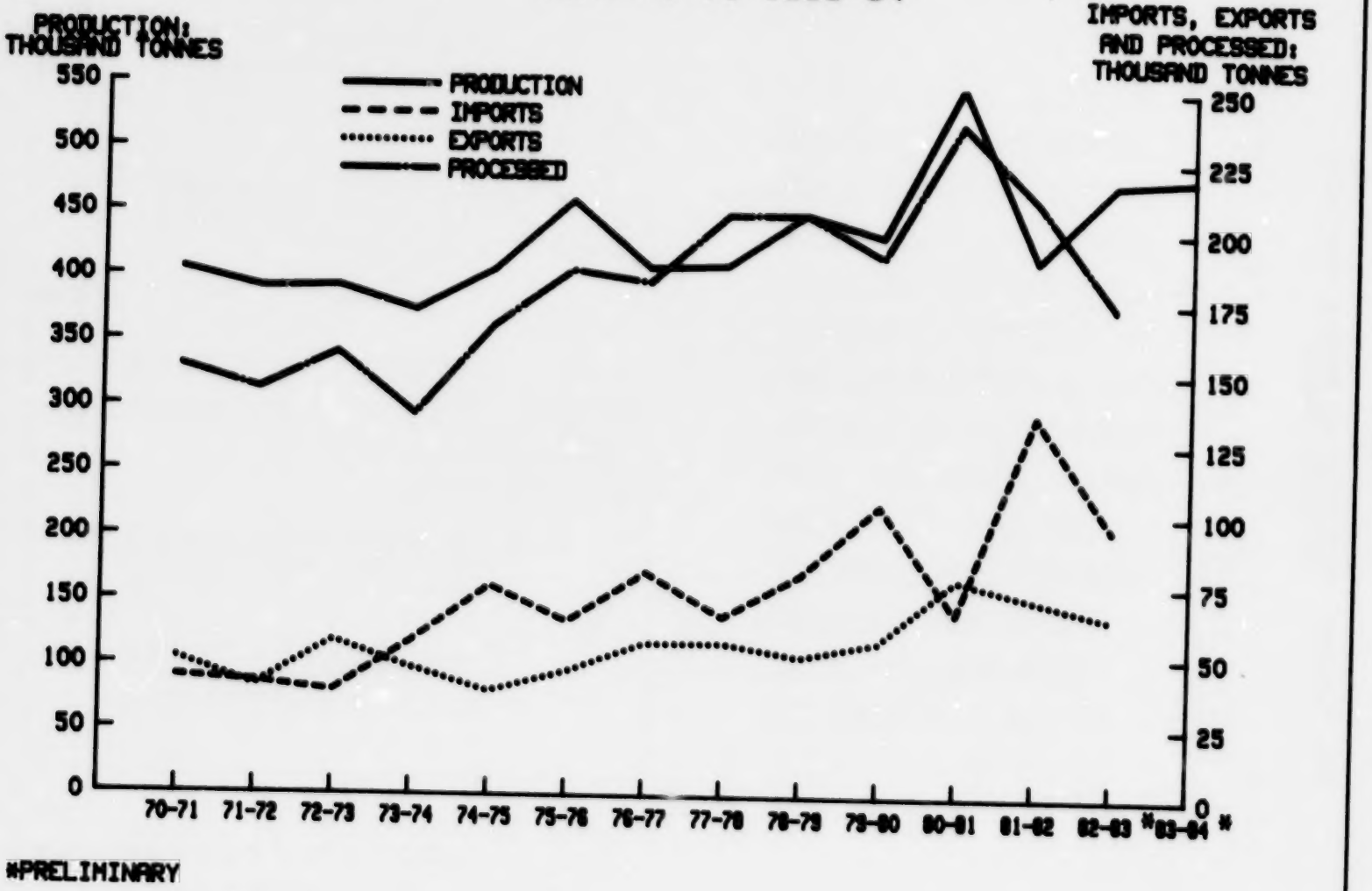


*PRELIMINARY

Crop year (July 1 to June 30)	Production			Average farm price	
	U.S.	Canada[1]	U.S. and Canada	U.S.	Canada[2]
	'000 tonnes			¢ (Can)/kg	
1970-71	12 150	2 500	14 650	4.43	4.76
1971-72	12 100	2 210	14 310	3.90	4.06
1972-73	11 310	1 990	13 300	6.50	7.69
1973-74	11 540	2 160	13 700	10.16	11.79
1974-75	13 120	2 500	15 620	7.87	6.61
1975-76	12 630	2 200	14 830	9.43	11.34
1976-77	13 960	2 350	16 310	7.43	9.01
1977-78	13 970	2 520	16 490	7.77	8.13
1978-79	14 740	2 510	17 250	7.56	8.46
1979-80	13 470	2 750	16 220	8.37	7.62
1980-81	12 080	2 470	14 560	16.61	16.16
1981-82	13 410	2 680	16 090	12.60	11.99
1982-83[3]	13 950	2 800	16 750	10.64	10.67
1983-84[3]	13 280	2 550	15 830		

[1]Beginning in 1971, basis is changed from 'all potatoes' to 'potatoes grown mainly for sale'.
[2]Includes Agricultural Stabilization Board payments to producers, effective 1974. Based on marketable production by province where available, combined with total production otherwise, resulting in a slight change of basis in 1973 and 1976.
[3]Preliminary

CANADIAN APPLES: SUPPLY, EXPORTS AND PROCESSED, 1970-71 TO 1983-84



*PRELIMINARY

APPENDIX A

TABLE 1. FRESH FRUIT: PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, 1971-75 TO 1983
TABLEAU 1. FRUITS A L'ETAT FRAIS: PRODUCTION, PRIX MOYEN ET VALEUR A LA FERME, 1971-75 A 1983

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981 Revisé	Preliminary 1982 Provisions	Estimated 1983 Estimé	
Apples						Pommes
Production (tonnes)	405079	452004[a]	422379	477626	481962	Production (tonnes métrique)
Value ('000 dollars)	47654[a]	85218[a]	99733	86146		Valeur ('000 dollars)
Average price (cents/kg.)	11.76	18.85	23.61	18.04		Prix moyen (cents/kg.)
Apricots						Abricots
Production (tonnes)	3180	2871[a]	1952	2764		Production (tonnes métrique)
Value ('000 dollars)	717	1021[a]	901	1200		Valeur ('000 dollars)
Average price (cents/kg.)	22.54	35.55	46.16	43.42		Prix moyen (cents/kg.)
Blueberries						Bleuets
Production (tonnes)	12292	14187	18033	23224		Production (tonnes métrique)
Value ('000 dollars)	6681	14902	19971	31598		Valeur ('000 dollars)
Average price (cents/kg.)	54.35	105.04	110.75	136.06		Prix moyen (cents/kg.)
Cantaloupes						Cantaloups
Production (tonnes)	946	712	489	484		Production (tonnes métrique)
Value ('000 dollars)	123	189	288	294		Valeur ('000 dollars)
Average price (cents/kg.)	12.99	26.50	58.90	60.74		Prix moyen (cents/kg.)
Cherries (Sweet and sour)						Cerises (Sucrées et aigres)
Production (tonnes)	17537	16650[a]	10324	10759		Production (tonnes métrique)
Value ('000 dollars)	7257[a]	11536[a]	9517	8878[a]		Valeur ('000 dollars)
Average price (cents/kg.)	41.38	69.29	92.18	82.52		Prix moyen (cents/kg.)
Cranberries						Canneberges
Production (tonnes)	4731	6758	7948	7120		Production (tonnes métrique)
Value ('000 dollars)	1228	3544	8506	8851		Valeur ('000 dollars)
Average price (cents/kg.)	25.95	52.45	107.02	124.31		Prix moyen (cents/kg.)
Grapes						Raisins
Production (tonnes)	68944	75382[a]	73026	74118		Production (tonnes métrique)
Value ('000 dollars)	15434	22809[a]	29393	34054		Valeur ('000 dollars)
Average price (cents/kg.)	22.39	30.26	40.25	45.95		Prix moyen (cents/kg.)
Loganberries						Mures Logan
Production (tonnes)	239	55	15	22		Production (tonnes métrique)
Value ('000 dollars)	139	59	29	48		Valeur ('000 dollars)
Average price (cents/kg.)	58.12	106.88	193.33	218.18		Prix moyen (cents/kg.)
Peaches						Peches
Production (tonnes)	50058	41611	27252	34257		Production (tonnes métrique)
Value ('000 dollars)	12563	16260	15392	21302		Valeur ('000 dollars)
Average price (cents/kg.)	25.10	39.08	56.48	62.18		Prix moyen (cents/kg.)
Pears						Poires
Production (tonnes)	37607	35132[a]	31711	30739		Production (tonnes métrique)
Value ('000 dollars)	5772[a]	8352[a]	9231	9251		Valeur ('000 dollars)
Average price (cents/kg.)	15.35	23.77	29.11	30.10		Prix moyen (cents/kg.)
Plums-Prunes						Prunes et Pruneaux
Production (tonnes)	8922	7468[a]	6026	6866		Production (tonnes métrique)
Value ('000 dollars)	1981[a]	2586[a]	2071	3513		Valeur ('000 dollars)
Average price (cents/kg.)	22.20	34.62	34.37	51.17		Prix moyen (cents/kg.)

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- à suivre

TABLE 1. FRESH FRUIT: PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, 1971-75 TO 1983 (CONTINUED)
TABLEAU 1. FRUITS A L'ETAT FRAIS: PRODUCTION, PRIX MOYEN ET VALEUR A LA FERME, 1971-75 A 1983 (SUITE)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981 Revisé	Preliminary 1982 Provisions	Estimated 1983 Estimé	
Raspberries						Framboises
Production (tonnes)	6404	7606	9065	12855		Production (tonnes métrique)
Value ('000 dollars)	5089[a]	10824	15775	25386		Valeur ('000 dollars)
Average price (cents/kg.)	79.47	142.30	174.02	197.46		Prix moyen (cents/kg.)
Strawberries						Fraises
Production (tonnes)	15723	23090	26693	31680		Production (tonnes métrique)
Value ('000 dollars)	10259	21999	30162	40273		Valeur ('000 dollars)
Average price (cents/kg.)	65.25	95.27	113.00	127.12		Prix moyen (cents/kg.)
Total Fruit						Fruits
Production (tonnes)	631661	683527[a]	634913	712515		Production (tonnes métrique)
Value ('000 dollars)	114897[a]	199299[a]	240969	270795[a]		Valeur ('000 dollars)

a. Includes subsidy payments made by the Agricultural Stabilization Board or the Agricultural Products Board, to Nov.4/83, except for the 1982 crops of apricots, pears and prunes.
Y compris les subventions versées par l'office de stabilisation des prix agricoles ou l'office des prix des produits agricoles, à 4 novembre, 1983, à l'exception des récoltes de 1982 pour les abricots, poires et pruneaux.

TABLE 2. FRESH FRUIT: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30)[1]
TABLEAU 2. FRUITS FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983, (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN)[1]

	Average 1971-75[a] Moyenne	Average 1976-80[a] Moyenne	1981	1982	Estimated 1983 Estimé	
		- tonnes - - tonnes métriques -				
Apples						**Pommes**
Production	405079	452004	422379	477626	482000	Production
Imports	53060	77781	135117	95393		Importations
Total supply	458139	529785	557496	573019		Approvisionnements
Fresh exports	43339	57747	70238	63597		Exportations, état frais
Processed	156115	203680	209933	173527		Industrie
Waste[2]	52446	53554	49245	65589		Pertes[2]
Available for fresh use[3]	206239	214804	228080	270306		Disponibles pour utilisation domestique[3]
Net Trade	-9721	-20035	-64879	-31796		Commerce net
Apricots						**Abricots**
Production[4]	3180	2871	1952	2764		Production[4]
Imports	890	905	958	921		Importations
Total supply	4070	3776	2910	3685		Approvisionnements
Fresh exports	36	12	0	0		Exportations, état frais
Processed	1365	1669	794	1436		Industrie
Available for fresh use[3]	2669	2096	2116	2249		Disponibles pour utilisation domestique[3]
Net Trade	-854	-894	-958	-921		Commerce net
Blueberries[5]						**Bleuets[5]**
Production	12292	14187	18033	23224		Production
Imports	1780	1771	2907	4429		Importations
Total supply	14072	15958	20940	27653		Approvisionnements
Fresh exports	2009	2577	2175	4277		Exportations, état frais
Processed	6324	9685	11281	12579		Industrie
Available for fresh use[3]	5738	3695	7484	10797		Disponibles pour utilisation domestique[3]
Net Trade	229	806	-732	-152		Commerce net
Frozen exports	5236	7097	11417	13485		Exportations, état congelé
Cantaloupes						**Cantaloups**
Production[6]	946	712	489	484		Production[6]
Imports[7]	30040	34127	35523	39170		Importations[7]
Total supply	30985	34840	36012	39654		Approvisionnements
Fresh exports	45	25	4	1		Exportations, état frais
Available for fresh use	30941	34814	36008	39653		Disponibles pour utilisation domestique
Net Trade	-29996	-34102	-35519	-39169		Commerce net

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- à suivre

TABLE 2. FRESH FRUIT: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30), (Continued)[1]

TABLEAU 2. FRUITS FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), (Suite)[1]

	Average 1971-75[8]. Moyenne	Average 1976-80[8]. Moyenne	1981	1982	Estimated 1983 Estimé
		- tonnes - - tonnes métriques -			
Cherries (Sweet and Sour)					Cerises (Sucrees et Aigres)
Production	17537	16650	10240	10759	Production
Imports	5879	7081	4569	8082	Importations
Total supply	23416	23730	14809	18841	Approvisionnements
Fresh exports	107	368	1	20	Exportations, état frais
Processed	9668	9816	5746	8134	Industrie
Available for fresh use[3]	13642	13545	9062	10687	Disponibles pour utilisation domestique[3]
Net Trade	-5772	-6712	-4568	-8062	Commerce net
Cranberries					Canneberges
Production	4731	6758	7948	7120	Production
Imports	1911	2106	3060	4500	Importations
Total supply	6642	8864	11008	11620	Approvisionnements
Fresh exports	..	6233	7356	6563	Exportations, état frais
Processed	1239	..	..	..	Industrie
Available for fresh use	..	..	..	..	Disponibles pour utilisation domestique
Net Trade	-1911	4127	4296	2063	Commerce net
Grapes					Raisins
Production	68944	75382	72669	74118	Production
Imports	118386	132035	128954	150705	Importations
Total supply	187331	207418	201623	224823	Approvisionnements
Fresh exports	1189	1615	820	2389	Exportations, état frais
Processed	65649	64211	62286	64944	Industrie
Available for fresh use[8]	120493	141592	138517	157490	Disponibles pour utilisation domestique[8]
Net Trade	-117198	-130421	-128134	-148316	Commerce net
Peaches					Peches
Production	50058	41611	27252	34257	Production
Imports	14448	18870	25168	15688	Importations
Total supply	64507	60481	52420	49945	Approvisionnements
Fresh exports	75	47	7	34	Exportations, état frais
Processed	11315	6372	3652	5152	Industrie
Available for fresh use[3]	53117	54062	48761	44759	Disponibles pour utilisation domestique[3]
Net Trade	-14373	-18822	-25161	-15654	Commerce net

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TABLE 2. FRESH FRUIT: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30), (Concluded)[1]

TABLEAU 2. FRUITS FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), (Fin)[1]

	Average 1971-75[a] Moyenne	Average 1976-80[a] Moyenne	1981	1982	Estimated 1983 Estimé	
			- tonnes - - tonnes métriques -			
Pears						Poires
Production	37607	35132	31514	30739		Production
Imports	22491	25525	31520	25657		Importations
Total supply	60099	60657	63034	56396		Approvisionnements
Fresh exports	1234	1021	917	496		Exportations, état frais
Processed	18008	14627	12665	9978		Industrie
Available for fresh use[3]	40856	45009	49452	45922		Disponibles pour utilisation domestique[3]
Net Trade	-21257	-24504	-30603	-25161		Commerce net
Plums/Prunes						Canneberges
Production	8922	7468	5918	6866		Production
Imports	14897	21630	24491	18179		Importations
Total supply	23818	29098	30409	25045		Approvisionnements
Fresh exports	29	0	0	11		Exportations, état frais
Processed	1902	985	808	662		Industrie
Available for fresh use[3]	21887	28113	29601	24372		Disponibles pour utilisation domestique[3]
Net Trade	-14868	-21629	-24491	-18168		Commerce net
Raspberries						Framboises
Production	6404	7606	9065	12856		Production
Imports[9]	..	211	258	285		Importations[9]
Total supply	6404	7818	9323	13141		Approvisionnements
Fresh exports	1396	2190	3131	5047		Exportations, état frais
Processed	5464	4954	6940	10971		Industrie
Available for fresh use[3]	-457	675	-748	-2877		Disponibles pour utilisation domestique[3]
Net Trade	1396	1978	2873	4762		Commerce net
Strawberries[10]						Fraises[10]
Production	15723	23090	26693	31680		Production
Imports	11613	15144	17978	15345		Importations
Total supply	27336	38234	44671	47025		Approvisionnements
Processed	4084	4224	4845	5434		Industrie
Available for fresh use[3]	23253	34010	39826	41591		Disponibles pour utilisation domestique[3]
Net Trade	-11613	-15144	-17978	-15345		Commerce net

a. Average excludes any year for which the amount is not available.
La moyenne ne comprend pas toute année dont le montant n'est pas disponible.

1. Not all data are comparable over the time period shown, due to lack of continuity of available data. This limitation applies to acquirements of fresh apricots, cherries, cranberries, grapes, pears, plums/prunes, raspberries and strawberries by processors.
Les données ne sont pas toutes comparables pour la période indiquée à cause d'un manque de continuité dans leur disponibilité. Cette réserve s'applique aux approvisionnements d'abricots frais, de cerises, de canneberges, de raisins, de poires, de prunes et de prunes à pruneaux, de framboises et de fraises utilisées par les transformateurs.

2. Waste: 20 percent of production plus 5 percent of imports minus 20 percent of processed.
Perte: 20 pourcent de la production plus 5 pourcent des importations moins 20 pourcent de la quantité destiné à la transformation

3. May also include fresh imports for processing.
Peut aussi comprendre les importations de fruits frais destinés à la transformation.

4. British Columbia only.
Colombie-Britannique seulement.

5. Excludes Ontario production, not available.
Exclus la production d'Ontario qui n'est pas disponible.

6. Ontario only.
Ontario seulement.

7. For 1978 to date, import data have been reduced to reflect the elimination of winter melons.
Le volume des données sur les importations effectués depuis 1978 a été réduit, reflétant ainsi l'élimination des melons d'hiver.

8. Includes fresh imports for commercial processing for 1975 to date, only. Also includes imported grapes, for home wine production for all years.
Comprend les importations en frais destinées à la transformation de 1975 à aujourd'hui, seulement.
Comprend aussi le raisin importé pour la production de vin de ménage pour toutes les années.

9. Crop year data are not available after 1965. Calendar year data apply from 1976 to date.
Les données pour les campagnes agricoles ne sont pas disponibles après 1965.
Les données des années civiles s'appliquent de 1976 à aujourd'hui.

10. Crop year: April 1 to March 31.
Campagne agricole: du 1er avril au 31 mars.

TABLE 3. PROVINCIAL FRESH FRUIT PRODUCTION, 1971-75 TO 1983
TABLEAU 3. PRODUCTION PROVINCIALE DE FRUITS FRAIS, 1971-75 A 1983

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
		- tonnes - - tonnes métriques -				
Newfoundland						Terre-Neuve
Blueberries	867	831	237	1023		Bleuets
Cranberries[1]	26	95	77	27		Canneberges[1]
Total	893	926	314	1050		Total
Prince Edward Island						Ile du Prince-Edouard
Blueberries	291	314	272	340		Bleuets
Cranberries	15	2	0	5		Canneberges
Strawberries	550	553	368	794		Fraises
Total	856	869	640	1139		Total
Nova Scotia						Nouvelle Ecosse
Apples	44007	45893	54486	59058	54295	Pommes
Blueberries	4101	4221	5889	6558		Bleuets
Cranberries	70	127	184	191		Canneberges
Pears	1442	1601	1928	1134	1134	Poires
Plums	113	218	45	23	113	Prunes
Raspberries	20	20	23	26		Framboises
Strawberries	1032	1474	1588	2268	2268	Fraises
Total	50786	53554	64143	69258		Total
New Brunswick						Nouveau-Brunswick
Apples	6173	5410	4953	6001	6287	Pommes
Blueberries	1801	1718	2313	3493		Bleuets
Raspberries	15	17	24	26		Framboises
Strawberries	576	826	828	1304		Fraises
Total	8564	7971	8118	10824		Total
Quebec						Québec
Apples	111295	95571	45303	78109	64449	Pommes
Blueberries	3059	3276	6350	5670		Bleuets
Raspberries	346	375	413	645		Framboises
Strawberries	3660	5614	6585	10152		Fraises
Total	118360	104836	58651	94576		Total
Ontario						Ontario
Apples	120157	154659	115575	159035	175818	Pommes
Cherries (Sweet)	3119	1629	712	1374	2443	Cerises (sucrées)
Cherries (Sour)	7027	6308	2337	6482	6380	Cerises (aigres)
Grapes	59803	63213	62436	58749	66007	Raisins
Peaches	37891	29265	15983	23515	27639	Pêches
Pears	17280	14537	12864	12054	14366	Poires
Plums/Prunes	4440	3398	2009	3888	2854	Prunes et Pruneaux
Raspberries	472	379	406	530	460	Framboises
Strawberries	5513	9040	10460	9435	8311	Fraises
Total	255701	267429	222782	275062	304278	Total

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TABLE 3. PROVINCIAL FRESH FRUIT PRODUCTION, 1971-75 TO 1983 (Concluded)
TABLEAU 3. PRODUCTION PROVINCIALE DE FRUITS FRAIS, 1971-75 A 1983 (Fin)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
			- tonnes - - tonnes métriques -			
British Columbia						Columbie-Britannique
Apples	123446	165471	202062	175423	181400	Pommes
Apricots	3180	2871	1952	2764		Abricots
Blueberries	2174	3827	2972	6140		Bleuets
Cherries (Sweet)	6717	7866	6457	2258		Cerises (sucrées)
Cherries (Sour)	675	845	734	645		Cerises (Aigres)
Cranberries	4621	6533	7687	6897		Canneberges
Grapes	9141	12170	10233	15369		Raisins
Loganberries	239	55	15	22		Mures Logan
Peaches	12168	12346	11269	10742		Pêches
Pears	18885	18994	16722	17551		Poires
Plums/Prunes	4369	3853	3864	2955		Prunes et Pruneaux
Raspberries	5551	6816	8199	11629		Framboises
Strawberries	4392	5571	6833	7682		Fraises
Total	195556	247217	278999	260077		Total

Source: Statistics Canada 'Fruit and Vegetable Production'
Statistique Canada 'Production de fruits et légumes'

1. Not available before 1974.
Non disponible avant 1974.

TABLE 4. CANNED FRUITS: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30)[1]
TABLEAU 4. FRUITS EN CONSERVE: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN)[1]

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
		- tonnes - - tonnes métriques -				
Apples (solid pack and pie filling)						Pommes (compactes et garnitures de tarte)
Stocks, July 1	4739	1819	2209	1935	3132	Stocks, 1er juillet
Production	7261	9253	5026	5758		Production
Imports[2,3]	580	588	470	711		Importations[2,3]
Total supply	12579	11660	7705	8404		Approvisionnements
Exports[2]	1622	930	478	118		Exportations[2]
Stocks, June 30	3828	1931	1935	3132		Stocks, 30 juin
Apparent domestic disapp.	7129	8799	5292	5154		Consommation domestique appar.
Apple Juice						Pommes Jus
Single strength[4]						Non concentré[4]
Stocks, July 1	15335	24368	37946	47872	38285	Stocks, 1er juillet
Production	67347	126868	159395	149390		Production
Imports[3,8]	..	1698	1440	1740		Importations[3,8]
Total supply	82681	152933	198781	199002		Approvisionnements
Exports	1490	2626	1081	2567		Exportations
Stocks, June 30	15276	27697	47872	38285		Stocks, 30 juin
Apparent domestic disapp.	65916	122610	149828	158150		Consommation domestique appar.
Concentrated[5]						Concentré[5]
Exports	1714	2133	11704	4498		Exportations
Imports[3,6]	..	32034	60993	76575		Importations[3,6]
Apple Sauce						Pommes Puree
Stocks, July 1	5947	6681	7246	7153	7529	Stocks, 1er juillet
Production	12833	13529	12421	12224		Production
Total supply	18781	20209	19667	19377		Approvisionnements
Stocks, June 30	6212	6454	7153	7529		Stocks, 30 juin
Apparent domestic disapp.	12569	13755	12514	11848		Consommation domestique appar.
Apricots						Abricots
Stocks, July 1	511	262	420	234	667	Stocks, 1er juillet
Production	919	857	625	930		Production
Imports[3]	2808	2265	2129	1740		Importations[3]
Total supply	4237	3384	3174	2904		Approvisionnements
Stocks, June 30	472	244	234	667		Stocks, 30 juin
Apparent domestic disapp.	3765	3140	2940	2237		Consommation domestique appar.

- continued
- à suivre

TABLE 4. CANNED FRUITS: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30) CONCLUDED[1]
TABLEAU 4. FRUITS EN CONSERVE: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN) FIN[1]

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
		- tonnes - - tonnes métriques -				
Cherries, Sweet and Sour						**Cerises, Sucrees et Aigres**
Stocks, July 1	927	1127	2044	1496	1041	Stocks, 1er juillet
Production	4115	4452	4092	3398		Production
Total supply	5042	5579	6136	4894		Approvisionnements
Exports	1553	2541	2865	2743		Exportations
Stocks, June 30	878	1344	1496	1041		Stocks, 30 juin
Apparent domestic disapp.	2611	1695	1775	1110		Consommation domestique appar.
Peaches						**Peches**
Stocks, July 1	2183	1383	1113	1004	1981	Stocks, 1er juillet
Production	7415	4366	2891	5144		Production
Imports[3]	27160	26494	23341	20768		Importations[3]
Total supply	36758	32243	27345	26916		Approvisionnements
Stocks, June 30	2105	1165	1004	1981		Stocks, 30 juin
Apparent domestic disapp.	34652	31078	26341	24935		Consommation domestique appar.
Pears						**Poires**
Stocks, July 1	4873	4018	5995	7137	5750	Stocks, 1er juillet
Production	12352	10787	10139	6734		Production
Imports[3]	6202	[illegible]79	5773	6105		Importations[3]
Total supply	23428	20983	21907	19976		Approvisionnements
Exports	15	3	116	8		Exportations
Stocks, June 30	5151	4014	7137	5750		Stocks, 30 juin
Apparent domestic disapp.	18261	16967	14654	14218		Consommation domestique appar.
Plums						**Prunes**
Stocks, July 1	1081	1121	896	958	985	Stocks, 1er juillet
Production	2578	1698	1165	1055		Production
Total supply	3659	2819	2061	2013		Approvisionnements
Stocks, June 30	1128	1023	958	985		Stocks, 30 juin
Apparent domestic disapp.	2531	1796	1103	1028		Consommation domestique appar.
Raspberries						**Framboises**
Stocks, July 1	103	101	96	24	176	Stocks, 1er juillet
Production	681	437	..	342		Production
Total supply	784	537	..	366		Approvisionnements
Stocks, June 30	123	61	24	176		Stocks, 30 juin
Apparent domestic disapp.	661	476	..	190		Consommation domestique appar.
Strawberries[7]						**Fraises[7]**
Stocks, April 1	228	490	384	343	254	Stocks, 1er avril
Production	841	946	769	579		Production
Total supply	1070	1435	1153	922		Approvisionnements
Stocks, March 31	232	474	343	254		Stocks, 31 mars
Apparent domestic disapp.	838	962	810	668		Consommation domestique appar.

1. Not all data are comparable over the time period shown due to lack of continuity of available data.
This limitation applies to stocks of strawberries (1979),apple pie filling (1976-78), sour cherries (1974,1976-78), raspberries (1976,1979-1980) and pears, except Bartlett (1980) and the pack of sour cherries (1976-79 and 1981-82), sweet cherries (1977-82) and pears, except Bartlett (1981 and 1982).
Les données ne sont pas toutes comparables pour la période indiquée, à cause d'un manque de continuité dans leur disponibilité. Cette réserve s'applique aux disponibilités de garniture pour tarte aux pommes (1976-1978), de cerises aigres (1974 et 1976-1978), de poires, sauf les Bartlett (1980), de framboises (1976,1979-1980), de fraises (1979), ainsi qu'à la production de cerises aigres (1976-1979 et 1981-1982), de cerises douces (1977-1982), et de poires, sauf les Bartlett (1981 et 1982).

2. Includes sauce but excludes pie filling.
Inclut la purée mais exclut la garniture de tarte.

3. Factors applied to convert import data as published by Statistics Canada to 'net weight' are: (1) Before 1971: 0.84. (2) 1971-73: 1.00. (3) 1974 to date: 0.90.
Facteurs de conversion en poids net des données à l'importation publiées par Statistique Canada: (1) Avant 1971: 0.84. (2) 1971-73: 1.00. (3) 1974 à ce jour: 0.90.

4. Includes juice reconstituted from concentrated, but excludes production, stocks and exports of concentrates.
Comprend le jus reconstitué de concentré, mais exclut la production, et stocks et les exportations de concentrés.

5. Exprassed as single strength equivalent, i.e. weight of concentrated juice times 6.1.
Exprimé en jus non concentré. C.-àd. poids du jus concentré fois 6.1.

6. Includes frozen concentrate. Not available before 1976 (averages limited accordingly).
Le produit concentré congelé est inclus. Données non disponibles avant 1976 (les moyennes sont rajustées en conséquence).

7. Crop year April 1 to March 31.
Campagne agricole 1er avril au 31 mars.

8. Available on a calendar year basis only, and not before 1976.
Données disponibles pour l'année civile et à partir de 1976 seulement.

TABLE 5. PRODUCTION OF FROZEN FRUIT AND VEGETABLES, EXCEPT POTATOES, CANADA[1]
1971-75 TO 1983 (CROP YEAR JUNE 1 TO MAY 31)

TABLEAU 5. PRODUCTION DE FRUITS ET LEGUMES CONGELES, A L'EXCEPTION DES POMMES DE TERRE, CANADA[1]
1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1ER JUIN AU 31 MAI)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
	- tonnes - - tonnes métriques -					
Frozen Fruits[2]						**Fruits Congelés[2]**
Apples	3160	3133	2160	2921		Pommes
Apricots	63	123	a.	a.		Abricots
Blueberries	4753	7993	10042	11406		Bleuets
Cherries	4090	4577	2622	4054	4668	Cerises
Peaches	142	a.	a.	a.		Pêches
Plums	151	0	a.	a.		Prunes
Raspberries	4808	5078	6958	10586		Framboises
Rhubarb	659	..	..	..	..	Rhubarbe
Strawberries	4687	3608	4987	5361	6293	Fraises
Other fruits	240	222	161	152		Autres fruits
Total	22753	24734	26930	34480		Total
Frozen Vegetables[4]						**Légumes Congelés[4]**
Asparagus	375	341	210	264	140	Asperges
Broccoli	2014	2828	4632	4100		Broccoli
Brussel Sprouts	1956	3466	4823	6130		Choux de Bruxelles
Beans, Green	6746	9403	8735	9598		Haricots, Verts
Beans, Wax	1144	2088	1327	2458		Haricots, Beurre
Carrots	6632	10929	11372	16457		Carottes
Cauliflower	1187	2009	3455	5386		Choux-fleur
Corn, Kernel	11907	19038	20465	28795		Maïs
Corn-on-the-cob	1453	3445	3105	3976		Maïs en épis
Peas	25162	31940	32824	41139		Pois
Other Vegetables[3]	5300	2320	1923	2502		Autres légumes[3]
Total	63876	87806	92871	120805		Total

.. Not available.
Non disponible.

a. Included in 'Other fruits'.
Compris dans 'Autres fruits'.

1. Not all data are comparable over the time period shown, due to lack of continuity of data available from the source(s).
This limitation applies to the production of apricots (1972 to date, except 1974 and 1979), sweet cherries (1981 and 1982), peaches (1976 to date), plums (1973 to date, except 1975), rhubarb (1975 to date), 'other fruits' (omitted in 1975 and 1976, and of varying content 1977 to date) and asparagus (1968-70, 1975 and 1976).
Cette réserve s'applique à la production d'abricots (1972 à ce jour, à l'exception de 1974 et 1979), de cerises douces (1981 et 1982) de pêches (1976 à ce jour), de prunes (1973 à ce jour, à l'exception de 1975), de rhubarbe (1975 à ce jour), d'autres fruits' (omis en 1975 et en 1976 et de composition diverse de 1977 à ce jour) et d'asperges (1968-1970, 1975 et 1976).

2. For 1975 to date, rhubarb, as well as minor frozen packs, all included before 1975, have been omitted (unavailable). In addition, apricots, sweet cherries, peaches and plums have been omitted (unavailable) for the years specified in footnote '1'.
De 1975 à ce jour, les données relatives à la rhubarbe, ainsi qu'à divers légumes congelés d'importance secondaire, incluses avant 1975, ont été omises (non disponibles). En outre, celles qui ont trait aux abricots, aux cerises douces, aux pêches et aux prunes ont été omises (non disponibles) pour les années indiquées au renvoi '1'.

3. Comprises lima beans, mushrooms, pumpkin, squash and, inconsistently, various other vegetables.
Y compris les haricots de Lima, les champignons, les citrouilles, les courges et, irrégulièrement, divers autres légumes.

4. Potatoes are excluded. For 1975 to date, various minor frozen packs that were included before 1975, other than lima beans, mushrooms, pumpkin and squash, have been omitted (unavailable), but not consistently for all years.
Sauf les pommes de terre. De 1975 à ce jour, les données relatives à divers légumes congelés d'importance secondaire, incluses avant 1975, ont été omises (non disponibles), quoique irrégulièrement d'une année à l'autre, sauf celles qui ont trait aux haricots de Lima, aux champignons,aux citrouilles et aux courges.

TABLE 6. FROZEN FRUITS AND VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JUNE 1 TO MAY 31)

TABLEAU 6. FRUITS ET LEGUMES CONGELES: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUIN AU 31 MAI)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
			- tonnes - - tonnes métriques -			
Frozen Fruits[1]						**Fruits Congelés**[1]
Stocks, June 1	11763	11698	12613	12093	15961	Stocks, 1er juin
Production[3]	22474	24591	26930	34480		Production[3]
Imports	14047	12769	12459	9745		Importations
Total supply	48284	49058	52002	56310		Approvisionnements
Exports	6901	8958	12523	14644		Exportations
Stocks, May 31	11633	12172	12093	15961		Stocks, 31 mai
Apparent domestic disappearance[3]	29750	27927	27386	25713		Consommation domestique apparente[3]
Net trade	-7146	-3810	64	4899		Commerce net
Frozen Vegetables[2]						**Légumes Congelés**[2]
Stocks, June 1	22987	34267	29131	27372	46908	Stocks, 1er juin
Production[3]	63806	87739	92871	120805		Production[3]
Imports	11387	15128	15522	12819		Importations
Total supply	98180	137133	137524	160996		Approvisionnements
Exports	8511	22159	23554	24438		Exportations
Stocks, May 31	26535	31916	27372	46908		Stocks, 31 mai
Apparent domestic disappearance[3]	63134	83057	86598	89650		Consommation domestique apparente[3]
Net trade	-2875	7032	8032	11619		Commerce net
Frozen Potato Products						**Produits Congelés de la Pomme de Terre**
Imports	1406	2820	1609	1019		Importations
Exports	9644	19907	21896	30838		Exportations

1. Excluding frozen juices.
   Excluant les jus congelés.

2. Excluding potatoes.
   Excluant les pommes de terre.

3. Data for 1975 to date lack production of some minor commodities previously included (not available).
   Les données de 1975 au présent n'incluse pas la production de divers produits peu importants, mais qui étaient inclus auparavant (non disponible).

TABLE 7. FRESH FRUIT AND VEGETABLE AVERAGE ANNUAL WHOLESALE PRICES, CANADA,[1] 1971-1975 TO 1983 (MARKET SHOWN IN BRACKETS)

TABLEAU 7. PRIX DE GROS MOYENS ANNUELS DES FRUITS ET LEGUMES FRAIS, CANADA,[1] 1971-1975 A 1983 (EMPLACEMENTS DES MARCHES ENTRE PARENTHESES)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983[2]	
	- dollars per kg - - dollars le kg -					
Apples						Pommes
Ontario fancy McIntosh,(Toronto)	.26	.42	.76	.50		McIntosh de l'Ontario de fantaise,(Toronto)
British Columbia fancy McIntosh,(Winnipeg)	.43	.74	1.23	.99		McIntosh de la C.-B. de fantaisie,(Winnipeg)
Apricots						Abricots
British Columbia No.1 (Winnipeg[3])	.57	.94	1.46	1.60	1.27	Colombie-Britannique no.1 (Winnipeg[3])
Blueberries						Bleuets
Eastern (Montreal[3])	1.23	2.57	3.23	3.38	3.53	De l'Est (Montréal[3])
British Columbia (all markets)	1.68	2.46	2.88	3.26		Colombie-Britannique (tous les marchés)
Cherries, No.1						Cerises, No.1
Ontario, black sweet (all markets)	.67	1.27	2.01	2.01		Noires, sucrées de l'Ontario (tous les marches)
British Columbia, sweet (Winnipeg[3])	1.02	1.35	2.00	2.37	1.96	Sucrees de la C.-B. (Winnipeg[3])
Grapes						Raisins
Ontario Blue No.1 (Toronto[3])	.39	.57	.66	.79		No.1, bleus de l'Ontario (Toronto[3])
Peaches						Peches
Ontario No.1 (Winnipeg[3])	.52	.81	1.19	1.21		No.1, de l'Ontario (Winnipeg[3])
British Columbia (Winnipeg[3])	.60	.98	1.33	1.31		De la C.-B. (Winnipeg[3])
Pears						Poires
Ontario (Toronto[3])	.33	.54	.65	.61		Ontario (Toronto[3])
British Columbia Bartlett fancy, (Winnipeg[3])	.42	.69	.82	.93		Bartlett de C.-B., de fantaisie (Winnipeg[3])
Plums and prunes						Prunes et pruneaux
Ontario No.1 plums (Montreal[3])	.49	.84	1.09	1.17		Prunes de l'Ontario No.1 (Montréal[3])
British Columbia prunes (Winnipeg[3])	.45	.64	.83	.90		Colombie-Britannique, pruneaux (Winnipeg[3])

- continue
- a suivre

TABLE 7. FRESH FRUIT AND VEGETABLE AVERAGE ANNUAL WHOLESALE PRICES, CANADA,[1] 1971-1975 TO 1983 (Continued)
TABLEAU 7. PRIX DE GROS MOYENS ANNUELS DES FRUITS ET LEGUMES FRAIS, CANADA,[1] 1971-1975 A 1983 (Suite)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983[2]	
			- dollars per kg - - dollars le kg -			
Raspberries						Framboises
East (all markets)	2.03	3.48	4.34	a.	a.	Est (tous les marchés)
West (all markets)	1.61	3.36	4.36	a.	a.	Ouest (tous les marchés)
Strawberries						Fraises
East (all markets)	1.09	1.57	1.90	2.10	2.13	Est (tous les marchés)
West (all markets)	.90	1.52	2.00	a.	a.	Ouest (tous les marchés)
Asparagus (local)						Asperges (locales)
Toronto	1.38	2.39	2.78	2.93	2.63	Toronto
Western markets	1.02	1.73	2.62	2.80	2.73	Marchés de l'Ouest
Beets						Betteraves
Montreal	.12	.23	.31	.24		Montréal
Toronto	.14	.21	.27	.26		Toronto
Vancouver	.29	.44	.64	.51		Vancouver
Cabbage						Choux
Montreal	.12	.18	.22	.15		Montréal
Toronto	.14	.22	.23	.23		Toronto
Vancouver	.22	.32	.45	.36		Vancouver
Carrots						Carottes
Montreal	.11	.26	.29	.22		Montréal
Toronto	.12	.25	.36	.28		Toronto
Vancouver	.20	.36	.44	.39		Vancouver
			- dollars per dozen - - dollars par douzaine -			
Cauliflower						Choux-fleurs
Montreal	4.00	6.50	7.69	8.11		Montréal
Toronto	4.75	7.09	7.98	8.06		Toronto
Vancouver	4.37	7.58	10.84	10.63		Vancouver
			- dollars per crate (2-2.5 dozen) - - dollars par caisse (2-2.5 douzaines) -			
Celery						Céleri
Montreal (Que. origin)	4.44	6.69	9.60	7.44		Montréal (origine Québec
Toronto	4.96	7.26	9.18	7.43		Toronto
Vancouver	6.61	10.04	13.36	11.23		Vancouver

- continue
- a suivre

TABLE 7. FRESH FRUIT AND VEGETABLE AVERAGE ANNUAL WHOLESALE PRICES, CANADA,[1] 1971-1975 TO 1983 (Continued)
TABLEAU 7. PRIX DE GROS MOYENS ANNUELS DES FRUITS ET LEGUMES FRAIS, CANADA,[1] 1971-1975 TO 1983 (Suite)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
		- dollars per crate (5 dozen) - - dollars la caisse (5 douzaines) -				
Corn (sweet)						Mais (sucré)
Montreal	3.04	3.37	5.41	4.27		Montréal
Toronto	2.70	3.85	5.07	6.49		Toronto
Vancouver	4.97	7.60	9.69	8.04		Vancouver
		- dollars per 2 dozen carton - - dollars le carton de 2 douzaines -				
Cucumbers (field)						Concombres (champs)
Montreal	2.45	3.29	2.36	3.82		Montréal
Toronto	1.59	2.87	3.07	3.21		Toronto
Vancouver	3.56	4.95	6.10	5.66		Vancouver
		- dollars per 1 1/2 dozen crate - - dollars la caisse 1 1/2 douzaines -				
Lettuce (head)						Laitue (tête)
Montreal	3.06	4.41	6.25	5.06		Montréal
Toronto	3.29	4.82	7.49	5.78		Toronto
		- dollars per kg - - dollars le kg -				
Onions, yellow						Oignons, jaunes
Montreal (Que. origin)	.17	.25	.36	.21		Montréal (origine Québec)
Toronto	.19	.24	.39	.29		Toronto
Vancouver (B.C. origin)	.24	.28	.49	.27		Vancouver (origine C.-B.)
Potatoes						Pommes de terre
Montreal (N.B. potatoes)	.13	.15	.16	.16		Montréal (pommes de terre du N.-B.)
Toronto (P.E.I. potatoes)	.14	.18	.19	.18		Toronto (pommes de terre de l'Ile du Prince-Edward)
Rutabagas (Turnips) (unwaxed)						Navets (non cirés)
Montreal (Que. origin)	.14	.18	.26	.19		Montréal (origine Québec)
Toronto (Ont. origin, waxed)	.15	.22	.27	.25		Toronto (origine Ontario, cires)
Vancouver (B.C. origin)	.22	.37	.42	.39		Vancouver (origine C.-B.)

- continue
- a suivre

TABLE 7. FRESH FRUIT AND VEGETABLE AVERAGE ANNUAL WHOLESALE PRICES, CANADA,[1]
1971-1975 TO 1983 (Concluded)

TABLEAU 7. PRIX DE GROS MOYENS ANNUELS DES FRUITS ET LEGUMES FRAIS, CANADA,[1]
1971-1975 TO 1983 (Fin)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
		- dollars per kg - - dollars le kg -				
Spinach						Epinards
Montreal	.32	.54	.71	.68		Montréal
Toronto	.37	.58	.86	.82		Toronto
Tomatoes (field)						Tomates (champs)
Montreal (red,Quebec)	.50	.61	.76	.77		Montréal (rouges,de Quebec)
Toronto (Ont. origin)	.29	.43	.58	.69		Toronto (origines Ont.)

a. Volume too small to establish a price.
Quantité insuffisante pour établir un prix.

1. Prices per kg are derived by applying estimated net weights to prices of commonly used packages.
Not all data are comparable over the period shown due to lack ofcontinuity of available data for some series.
This limitation applies to Ontario grapes and plums before 1970,B.C. apricots before 1977, cherries from B.C. before 1974, and from Ont. before 1975, B.C. prunes before 1974, raspberries from the west in 1974 and from the east before 1980, western strawberries in 1973 and 1974, asparagus at western markets before 1981, and at Toronto in 1979, 1982 and before 1977, Montreal corn before 1978, cucumbers at Montreal in 1975 and 1979 to date and at Vancouver in 1975 and 1980 to date, and spinach before 1979.
Pour calculer le prix au kilo on a établi le rapport entre les poids nets estimatifs et les prix des emballages d'usage courant.
Les données ne sont pas toutes comparables pour la période indiquée à cause d'un manque de continuité, dans leur disponibilité pour certaines séries.
Cette réserve s'applique aux raisins et prunes de l'Ontario (avant 1970), aux abricots (avant 1977), aux cerises de la C.-B. (avant 1974), et de l'Ontario (avant 1975), aux pruneaux de la C.-B. (avant 1974), aux framboises de l'Ouest (en 1974), et de l'Est (avant 1980), aux fraises de l'Ouest (en 1973 et 1974), aux asperges sur les marchés de l'Ouest (avant 1981), et de Toronto (en 1979,1982 et avant 1977), au maïs à Montréal (avant 1978), aux concombres à Montréal (en 1975 et 1979 à ce jour) et à Vancouver (en 1975 et 1980 à ce jour) et aux épinards avant 1979.

2. Preliminary.
Provisoire.

3. Data for 1978 to 1980 may be slightly inaccurate.
Les données pour 1978 à 1980 peuvent être légèrement inexactes.

TABLE 8. MINIMUM PRICES[1] FOR PROCESSING FRUITS AND VEGETABLES, BRITISH COLUMBIA AND ONTARIO, 1971-1975 TO 1983

TABLEAU 8. FRUITS ET LEGUMES: PRIX[1] MINIMAUX A LA CONSERVERIE, COLOMBIE-BRITANNIQUE ET ONTARIO, 1971-1975 A 1983

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
	- dollars per tonne - - dollars la tonne métrique -					
Cherries						Cerises
British Columbia[18]						Colombie-Britannique[18]
Bing[3]	502.66	780.44	1102.31	1212.54	992.08	Bing[3]
Ontario						Ontario
Sweet White	456.91	767.76	992.63	1102.86	1103.96	Blanches sucrees
Sweet Black	456.91	767.76	992.63	1102.86	1103.96	Noires sucrees
Sweet Black for brining	322.42	538.48	573.75	441.48	574.86	Noires sucrees saumure
Sour (graded 92)[4]	309.99	760.93	1222.46	518.09	1066.21	Aigres (classe 92)[4]
Grapes: Concord, etc.						Raisins: Concord, etc.
British Columbia (base price, 100% sugar std.)	246.70	339.07	447.54	447.54	465.18	Colombie-Britannique, (prix de base, 100% norme pour sucre)
Ontario (class 1)	187.39	236.22	308.65	334.00	337.31	Ontario (categorie 1)
Peaches						Pêches
British Columbia[18]						Colombie-Britannique[18]
5.72cm up						5.72cm et plus
Vee, etc.	234.79	341.72	523.60	578.71	385.81	Vee, etc
Elberta	229.28	326.28	523.60	578.71	..[8]	Elberta
Ontario[5]						Ontario[5]
Freestone, 5.4cm up	195.77	279.00	386.91	411.16	411.71	A noyau non adherent 5.4cm et plus
Clingstone, 5.4cm up	190.81	308.09	442.03	469.58	470.14	A noyau adhérent, 5.4cm et plus
Pears						Poires
British Columbia[18]						Colombie-Britannique[18]
Bartlett, 6.03cm up	192.90	284.39	413.37	413.37	413.37	Bartlett, 6.03cm et plus
Ontario[5]						Ontario[5]
Bartlett, 5.56cm up[17]	188.60	286.71	370.38	370.38	321.32	Bartlett, 5.56cm et plus[17]
Kieffer, 5.72cm up[6]	109.13	151.24	203.93	203.93	204.48	Kieffer, 5.72cm et plus[6]
Prunes						Pruneaux
British Columbia[18]						Colombie-Britannique[18]
Italian, 3.18cm up	191.80	292.11	440.92	440.92	440.92	Italienne, 3.18cm et plus
Ontario[5]						Ontario[5]
Italian, Felenburg, etc.	194.56	282.97	331.24	351.09	352.19	Italienne, Felenburg, etc.

- continue
- a suivre

TABLE 8. MINIMUM PRICES[1] FOR PROCESSING FRUITS AND VEGETABLES, BRITISH COLUMBIA AND ONTARIO, 1971-1975 TO 1983 (Concluded)

TABLEAU 8. FRUITS ET LEGUMES: PRIX[1] MINIMAUX A LA CONSERVERIE, COLOMBIE-BRITANNIQUE ET ONTARIO, 1971-1975 A 1983 (Fin)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983	
		- dollars per kg - - dollars le kg -				
Raspberries[7]						Framboises[7]
British Columbia						Colombie-Britannique
All varieties	.71	1.23	1.38	1.87	.94	Toutes variétés
Strawberries						Fraises
British Columbia[8]	.58	.87	1.14	1.32	1.36	Colombie-Britannique[8]
Ontario	.54	1.05	..	..	..	Ontario
Asparagus, No. 1 Grade						Asperges, Catégorie no.1
British Columbia[9]	.69	1.17	1.68	1.72	1.61	Colombie-Britannique[9]
Ontario[10]	.82	1.31	1.90	2.06	2.11	Ontario[10]
		- dollars per tonne - - dollars la tonne métrique -				
Beans, green and wax						Haricots verts et jaunes
British Columbia[11]	132.28	212.97	279.99	297.62	297.62	Colombie-Britannique[11]
Ontario	138.61	184.97	232.59	249.12	249.12	Ontario
Carrots (early)[12]						Carottes (hâtives)[12]
British Columbia[13]	57.10	49.60	a.	a.	a.	Colombie-Britannique[13]
Ontario (no.1 grade), 3.18cm dia.	73.39	98.31	115.74	121.25	118.66	Ontario (categorie no.1) 3.18cm dia.
Corn, sweet (contract)						Maïs sucré (sous contrat)
British Columbia	46.90	71.81	110.23	111.88	105.82	Colombie-Britannique
Ontario[14]	45.91	66.53	87.91	92.32	91.49	Ontario[14]
Peas, green[15]						Pois, verts[15]
British Columbia (108-109 formerly 106-110)	172.28	259.36	321.15	380.47	380.47	Colombie-Britannique (108-109 autrefois 106-110)
Ontario (0-80)	277.25	431.27	558.25	586.17	571.44	Ontario (0-80)
Tomatoes, no. 1						Tomates, no. 1
British Columbia	60.41	86.26	105.82	112.44	a.	Colombie-Britannique
Ontario[16]	68.18	97.06	116.79	123.59	123.07	Ontario[16]

a. Quantity under contract is insignificant.
La quantité sous contrat est minime.

1. Not all data are comparable over the time period shown, due to the lack of continuity of available data. This limitation applies to the price of Ontario peaches (1976 and 1977), B.C. Bartlett pears (1970), Ont. Bartlett pears (before 1974), Ont. strawberries (1973-78 and after 1980), B.C. tomatoes (1972) and B.C. carrots after 1975.
Les données ne sont pas toutes comparables pour la période indiquée parce que les données, sont incomplètes pour certaines années. Cette réserve s'applique aux pêches de l'Ontario (1976 et 1977), aux poires Bartlett de la Colombie-Britannique (1970), aux poires Bartlett de l'Ontario (avant 1974), aux fraises de l'Ontario (1973-78 et après 1980), aux tomates de la Colombie-Britannique (1972), et aux carottes de la C.-B. après 1975.

3. No. 1 or commercial.
No. 1 ou commercial.

4. All varieties of ungraded sour cherries before 1974. Price shown is before deduction of marketing board license fee, varying from 3.31 dollars per tonne (1970) to 26.46 dollars per tonne (1982), including the processor's share of grading and promotion costs.
Toutes les variétés de cerises sûres non classées avant 1974. Le prix ne comprend pas la déduction du coût, du permis de mise en marché, qui a varié de 3,31 dollars à 26,46 dollars la tonne entre 1970 et 1982, mais tient compte de la partie des frais de classement et de promotion imputable au transformateur.

5. Price shown is before deduction of marketing board license fee, varying from 1.65 or 2.20 dollars per tonne (1970), to 7.72 or 8.82 per tonne (1978 to date), including processor's share of promotion costs.
Le prix indiqué ne comprend pas la déduction du coût du permis de mise en marché, qui a varié de 1,65 ou 2,20 dollars, la tonne (1970) à 7,72 ou 8,82 dollars la tonne (à partir de 1978), mais tient compte de la partie des frais, de publicité imputable au transformateur.

6. Before 1975, minimum diametewr was 5.24 cm. Excludes premium for delivery later than early November.
Avant 1975, le diamètre minimum était 5.24 cm. Ne comprend pas la prime aux livraisons après le début de novembre.

7. Ontario not available
Non disponible pour l'Ontario.

8. Average or contract prices paid by processors, lower mainland area. The 1974 price is the average for choice and fancy grades.
Moyenne ou prix sous contrat payé par les conserveries pour les régions basses. Le prix de 1974, est la moyenne pour les catégories 'de choix et 'de luxe.

9. Excludes premium for U.S. dollar exchange.
Ne comprend pas la prime au change des dollars E.U.

10. Stalks 17.8 cm, 1972 to date.
Tiges de 17.8 cm, de 1972 à date.

11. Average price paid by processors in B.C., 1960 to 1968. Minimum contract price for mechanically harvested beans, subject to a premium for beans under 0.95 cm in diameter) 1969 to date.
Prix moyen payé par les conserveries en C.-B., de 1960 à 1968. Prix minimum sous contrat pour haricots, récoltés mécaniquement de 1969 à date (avec prime pour haricots d'un diamètre en dessous de 0.95 cm).

12. Delivered July 1 to 20 in B.C., and late June to early August in Ontario.
Livré du 1er au 20 juillet en C.-B. et de juin au commencement août en Ontario.

13. Contract prices paid by processors, lower mainland area.
Prix sous contrat payé par les processeurs pour les régions basses.

14. Price for domestic sales, higher than for export sales, effective 1978.
Prix de vente au pays plus élevé qu'à l'exportation, en vigueur en 1978.

15. Tenderometer reading is shown in brackets.
Lecture du tendromètre indiquée entre parenthèses.

16. Effective 1982, prices apply to Agtron range 0-30, option 'A'.
Depuis 1982, les prix s'appliquent aux fruits classés selon le système Agtron, gamme de couleurs 0-30, option 'A'.

17. Before 1983, minimum diameter was 5.4cm.
Avant 1983, le diamètre minimal était de 5,4cm.

18. Marketing board asking price.
Prix demandé par l'office de commercialisation.

TABLE 9. FRESH VEGETABLES: PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, 1971-75 TO 1983[1]
TABLEAU 9. LEGUMES A L'ETAT FRAIS: PRODUCTION, PRIX MOYEN ET VALEUR A LA FERME, 1371-75 A 1983[1]

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981[2] Revisé	Preliminary 1982[2] Provisions	Estimated 1983 Estimé	
Asparagus						Asperges
Production (tonnes)	2811.60	2484.20	2163.00	2829.00		Production (tonnes métrique)
Value ('000 dollars)	2250.40	3327.40	4326.00	6416.00		Valeur ('000 dollars)
Average price (cents/kg.)	80.04	133.94	200.00	226.79		Prix moyen (cents/kg.)
Beans, Green and Wax, Fresh						Haricot, Verts et Jaunes, Frais
Production (tonnes)	5049.00	6266.20	7294.00	9004.00		Production (tonnes métrique
Value ('000 dollars)	1727.60	2955.80	4176.30	5090.00		Valeur ('000 dollars)
Average price (cents/kg.)	34.22	47.17	57.25	56.53		Prix moyen (cents/kg.)
Processing						Transformation
Production (tonnes)	37854.40	40138.00	35178.00	38028.00		Production (tonnes métrique
Value ('000 dollars)	4211.20	6856.60	7660.00	9254.00		Valeur ('000 dollars)
Average price (cents/kg.)	11.12	17.08	21.77	24.33		Prix moyen (cents/kg.)
Beets						Betteraves
Production (tonnes)	18272.60	20065.20	19567.00	23128.00		Production (tonnes métrique
Value ('000 dollars)	1311.00	2283.00	3023.00	3216.00		Valeur ('000 dollars)
Average price (cents/kg.)	7.17	11.38	15.45	13.91		Prix moyen (cents/kg.)
Cabbage						Choux
Production (tonnes)	79601.40	121405.40	143579.00	156688.00		Production (tonnes métrique
Value ('000 dollars)	7110.80	14367.00	21192.00	20488.00		Valeur ('000 dollars)
Average price (cents/kg.)	8.93	11.83	14.76	13.08		Prix moyen (cents/kg.)
Carrots						Carottes
Production (tonnes)	173737.00	211471.20	256572.00	284795.00		Production (tonnes métrique
Value ('000 dollars)	11000.20[3]	22716.20	33058.00	28094.00		Valeur ('000 dollars)
Average price (cents/kg.)	6.33	10.74	12.88	9.86		Prix moyen (cents/kg.)
Cauliflower						Choux-fleurs
Production (tonnes)	16222.00	26012.20	30784.00	47631.00		Production (tonnes métrique
Value ('000 dollars)	3555.20	8020.60	11347.00	18001.00		Valeur ('000 dollars)
Average price (cents/kg.)	21.92	30.83	36.86	37.79		Prix moyen (cents/kg.)
Celery						Celeri
Production (tonnes)	22124.40	27489.20	36144.00	33720.00		Production (tonnes métrique
Value ('000 dollars)	2476.40	4810.00	9140.00	7408.00		Valeur ('000 dollars)
Average price (cents/kg.)	11.19	17.50	25.29	21.97		Prix moyen (cents/kg.)
Corn, Processing						Maïs, Transformation
Production (tonnes)	205887.60	218986.40	229503.00	278039.00		Production (tonnes métrique
Value ('000 dollars)	8941.00	13500.00	18133.00	23606.00		Valeur ('000 dollars)
Average price (cents/kg.)	4.34	6.16	7.90	8.49		Prix moyen (cents/kg.)
Corn, Table						Maïs, Table
Production (tonnes)	31003.00	38274.60	42120.00	46088.00		Production (tonnes métrique
Value ('000 dollars)	4559.20	9244.20	13639.00	16285.00		Valeur ('000 dollars)
Average price (cents/kg.)	14.71	24.15	32.38	35.33		Prix moyen (cents/kg.)

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TABLE 9. FRESH VEGETABLES: PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, 1971-75 TO 1983[1] (CONTINUED)
TABLEAU 9. LEGUMES A L'ETAT FRAIS: PRODUCTION, PRIX MOYEN ET VALEUR A LA FERME, 1971-75 A 1983[1] (SUITE)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981[2] Revisé	Preliminary 1982[2] Provisions	Estimated 1983[2] Estimé	
Cucumbers, field						Concombres des champs
Production (tonnes)	57209.60	63231.60	64889.00	61640.00		Production (tonnes métrique)
Value ('000 dollars)	7188.20	12152.80	14405.00	15522.00		Valeur ('000 dollars)
Average price (cents/kg.)	12.56	19.22	22.20	25.18		Prix moyen (cents/kg.)
Cucumbers, greenhouse[3]						Concombres de serres chaudes[3]
Production (tonnes)	8718.20	12170.20[a]	15662.00[a]	15971.00		Production (tonnes métrique)
Value ('000 dollars)	4423.00	10155.40[a]	15644.00[a]	15574.00		Valeur ('000 dollars)
Average price (cents/kg.)	50.73	83.44	99.89	97.51		Prix moyen (cents/kg.)
Lettuce						Laitue
Production (tonnes)	30957.40	38513.00	40943.00	39152.00		Production (tonnes métrique)
Value ('000 dollars)	4940.20	8812.40	13400.00	12870.00		Valeur ('000 dollars)
Average price (cents/kg.)	15.96	22.88	32.73	32.87		Prix moyen (cents/kg.)
Mushrooms						Champignons
Production (tonnes)	17552.80	23610.80	32709.00	35150.00		Production (tonnes métrique)
Value ('000 dollars)	21735.20	46466.80	82564.00	89233.00		Valeur ('000 dollars)
Average price (cents/kg.)	123.85	196.80	252.42	253.86		Prix moyen (cents/kg.)
Onions						Oignons
Production (tonnes)	95360.80	109788.20[a]	129125.00	131621.00		Production (tonnes métrique)
Value ('000 dollars)	11602.40	16167.20[a]	27477.00	18829.00		Valeur ('000 dollars)
Average price (cents/kg.)	12.17	14.73	21.28	14.31		Prix moyen (cents/kg.)
Parsnips						Panais
Production (tonnes)	3408.00	3001.60	2757.00	3327.00		Production (tonnes métrique)
Value ('000 dollars)	565.40	948.00	1265.00	1320.00		Valeur ('000 dollars)
Average price (cents/kg.)	16.59	31.58	45.88	39.68		Prix moyen (cents/kg.)
Peas, Processing						Pois, Transformation
Production (tonnes)	65799.00	66682.40	62651.00	73380.00		Production (tonnes métrique)
Value ('000 dollars)	10528.80	16747.40	20398.00	25480.00		Valeur ('000 dollars)
Average price (cents/kg.)	16.00	25.12	32.56	34.72		Prix moyen (cents/kg.)
Potatoes[4]						Pommes de terre[4]
Production (tonnes)	2216242.00	2521584.00[a]	2683180.00	2799700.00	2550210.00	Production (tonnes métrique)
Value ('000 dollars)	169992.80[a]	218345.80[a]	278744.00	243606.00		Valeur ('000 dollars)
Average price (dol./10 kg.)	.81	.98	1.20	1.07		Prix moyen (dol./10 kg)
Rutabagas						Navets
Production (tonnes)	93623.00	100977.80	105112.00	103642.00		Production (tonnes métrique)
Value ('000 dollars)	7082.40	11893.60	15530.00	12184.00		Valeur ('000 dollars)
Average price (cents/kg.)	7.56	11.78	14.77	11.76		Prix moyen (cents/kg.)

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TABLE 9. FRESH VEGETABLES: PRODUCTION, FARM VALUE AND AVERAGE FARM PRICE, 1971-75 TO 1983[1] (CONCLUDED)
TABLEAU 9. LEGUMES A L'ETAT FRAIS: PRODUCTION, PRIX MOYEN ET VALEUR A LA FERME, 1971-75 A 1983[1] (FIN)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981[2] Revisé	Preliminary 1982[2] Provisions	Estimated 1983 Estimé	
Spinach						Epinards
Production (tonnes)	2589.60	3098.20	2447.00	3249.00		Production (tonnes métrique)
Value ('000 dollars)	534.20	1216.60	1265.00	1581.00		Valeur ('000 dollars)
Average price (cents/kg.)	20.63	39.27	51.70	48.66		Prix moyen (cents/kg.)
Tomatoes, Processing						Tomates, Transformation
Production (tonnes)	332089.80	404199.20	454614.00	477132.00		Production (tonnes métrique
Value ('000 dollars)	21302.00	37237.80	50133.00	56208.00		Valeur ('000 dollars)
Average price (cents/kg.)	6.41	9.21	11.03	11.78		Prix moyen (cents/kg.)
Tomatoes, Fresh, field						Tomates, de jardin, champs
Production (tonnes)	32783.20	33428.80	33986.00	44071.00		Production (tonnes métrique
Value ('000 dollars)	8167.60	11895.20	13595.00	17118.00		Valeur ('000 dollars)
Average price (cents/kg.)	24.91	35.58	40.00	38.84		Prix moyen (cents/kg.)
Tomatoes, Greenhouse						Tomates, de serres chaudes
Production (tonnes)	13416.00	15515.00	14884.00	15072.00		Production (tonnes métrique
Value ('000 dollars)	10680.40	17573.60[a]	20128.00[a]	22357.00		Valeur ('000 dollars)
Average price (cents/kg.)	79.61	113.27	135.23	148.33		Prix moyen (cents/kg.)
Total Vegetables						Legumes
Production (tonnes)	3562312.40	4108393.40	4445863.00	4723057.00		Production (tonnes métrique
Value ('000 dollars)	325885.60[a]	497693.40[a]	680152.00[a]	669740.00		Valeur ('000 dollars)

a. Includes subsidy payments made by the Agricultural Stabilization Board, as of 5 Nov. 1982.
Y compris les subventions versées par l'office de stabilisation des prix agricoles, jusqu'à 5 novembre 1982.

1. Crop year, 1 July - 30 June except 1 May - 30 Apr. for asparagus and calendar year for mushrooms.
Campagne allant du 1er juillet au 30 juin, sauf pour les asperges (1er mai au 30 avril) et pour les champignons (année civile).

2. Principal source: Statistics Canada 'Fruit Vegetable Production', Nov. 1982 issue.
Source principale: Statistique Canada, 'Production de fruits et légumes', Novembre 1982.

3. Conversion: 1 doz. = 4.535 kg before 1975,
= 4.7627 kg in 1975,
= 5 kg in 1976 and 1977,
= 5.2163 kg in 1978 and 1979,
= 5.4431 kg from 1980 to date.

Conversion: 1 douz. = 4.535 kg avant 1975,
= 4.7627 kg en 1975,
= 5 kg en 1976 et 1977,
= 5.2163 kg en 1978 et 1979,
= 5.4431 kg de 1980 à ce jour.

4. Total production is shown. Includes Newfoundland from 1975 to date. The farm values and average prices, are derived from the marketable production in an increasing number of eastern provinces, (until totalling 5 in 1976), and from the total production in the remaining provinces.
Ceci comporte la production totale. Comprend Terre-Neuve de 1975 à ce jour. La valeur et le prix à la ferme, sont calculés sur une production marchande dans un nombre croissant de provinces de l'est (jusqu'au total du 5 en 1976), et sur la production totale dans les autres provinces.

TABLE 10. POTATOES AND OTHER VEGETABLES: PLANTED AREA[1] IN CANADA, BY PROVINCE, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30)

TABLEAU 10. POMMES DE TERRE ET AUTRE LEGUMES: SUPERFICIE ENSEMENCEE[1] AU CANADA, PAR PROVINCE, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1ER JUILLET AU 30 JUIN)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
			- hectares -			
Potatoes						**Pommes de Terre**
Newfoundland[2]	..	432	405	325	285	Terre-Neuve[3]
Prince Edward Island	18276	22630	25900	27920	28330	Ile du Prince-Edouard
Nova Scotia	1484	1556	1540	1620	1580	Nouveau-Ecosse
New Brunswick	21804	22540	21850	21850	21450	Nouveau-Brunswick
Quebec	19910	17654	17200	17810	17810	Québec
Ontario	17394	18122	15820	15820	15380	Ontario
Manitoba	12276	14972	16550	15990	15780	Manitoba
Saskatchewan	1156	842	1010	1050	970	Saskatchewan
Alberta	9154	6728	6720	7280	7490	Alberta
British Columbia	4338	4208	3520	3640	3680	Columbie-Britannique
Canada	106265	109704	110515	113305	112755	Canada
Other Vegetables						**Autre Légumes**
Newfoundland[3]	..	473	458	386		Terre-Neuve[3]
Prince Edward Island[5]	2315	756	635	577		Ile du Prince-Edouard[5]
Nova Scotia[9]	1040	1031	1369	1351		Nouveau-Ecosse[9]
New Brunswick[4,9]	2587	1122	916	918		Nouveau-Brunswick[4,9]
Quebec	31541	28783	27725	30417		Québec
Ontario	50221	51019	52050	56322	52205	Ontario
Manitoba[10]	1045	747	851	942	807	Manitoba[10]
Alberta[7]	3051	3450	3323	3598		Alberta[7]
British Columbia[8]	5498	5822	5523	7708		Columbie-Britannique[8]
Residual (mainly processing in Maritimes and Praries)[2]	2151	1459	1707	1688		Résidu (principalement pour transformation dans les Maritimes et les provinces des Prairies)[2]
Maritimes Peas[6]	3628	3752	3423	4116		Pois des Maritimes[6]
Canada	99554	97687	97979	108024		Canada

1. Harvested areas apply to beans, corn, peas and tomatoes for processing.
Les superficies récoltées à l'entreprise s'appliquent aux haricots, au blé d'inde, aux pois, et aux tomates destinées aux conserveries.

2. Confidential provincial data, beginning in 1970, available only when combined with other provinces. Includes Prairie beans, N.S. and N.B. processing beans, and tomatoes after 1969, N.S. and N.B. fresh tomatoes in 1975 and B.C. and Prairie processing corn in 1973 and 1974. Also includes a minor part (probably less than 20 acres), of fresh use beans in N.S. N.B. during 1977-79 and includes all Maritimes beans in 1980.
Données provinciales confidentielles, commençant en 1970 disponibles seulement en combinaison, avec celles des autres provinces. Comprend les haricots des Prairies et les haricots et tomates de transformation, de N.E. et N.B. après 1969 ainsi que le maïs de transformation de C.-B. et des Prairies en 1973 et 1974. Aussi comprend les tomates fraîches de N.-E. et N.-B. et une faible partie (probablement moins de 20 acres), de haricots en frais en N.-E. et N.-B. de 1977 à 1979 ainsi que toute la superficie de haricots des Maritimes en 1980.

3. Data are available for, and averages apply to, the period 1975-76 to date, only.
Données et moyennes disponibles s'appliquent à la période 1975-76 et jusqu'à ce jour seulement.

4. Includes N.S. peas from 1970 to 1976.
Comprend les pois de la N.-E. de 1970 à 1976.

5. Includes a calculated estimate, based on Maritimes area, for peas for 1971. Lacks peas, possibly over 1200 hectares, from 1977 to date.
Comprend un chiffre estimatif fondé sur la région des Maritimes, pour les pois, pour 1971. Il y manque les pois, une superficie de peut-être 1200 hectares, de 1977 à ce jour.

6. Duplicated in provincial data (above) only before 1977, the year that the source ceased to separate the Maritimes by province.
Se répète dans les données provinciales (ci-dessus) seulement avant 1977. A partir de cette année, la source a cessé d'être ventilée par province pour les Maritimes.

7. Includes Manitoba peas for all years and all Manitoba corn for the years before 1973 and after 1975, as well as Manitoba fresh corn in 1973 and 1974. Excludes processing corn in 1973 and 1974 only.
Includes all Manitoba beans before 1970 but excludes all beans after 1969.
Les pois du Manitoba sont compris pour toutes les années et tout le maïs du Manitoba pour les années précédant 1973, et après 1975 ainsi que le maïs frais du Manitoba en 1973 et 1974. Ne comprend pas le maïs de transformation en 1973, et 1974 seulement. Comprend tous les haricots du Manitoba avant 1970 mais non compris tous les haricots avant 1969.

8. Excludes processing tomatoes in 1970, 1971 and 1972.
Ne comprend pas les tomates destinées à la transformation en 1970, 1971 et 1972.

9. After 1969, excludes processing beans and tomatoes, as well as all tomatoes in 1975, which are included in 'Residual'. Excludes peas only after 1976.
Après 1969, exclut les haricots et tomates de transformation et, en 1975, toutes les tomates aussi, qui sont inclues dans 'Résidu.' Ne comprend pas les pois seulement après 1976.

10. Includes all Manitoba corn in 1975. All corn is excluded for other years.
Comprend tout le maïs du Manitoba en 1975. Ne comprend pas tout le maïs pour les autres années.

TABLE 11. FRESH VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30, UNLESS NOTED OTHERWISE)
TABLEAU 11. LEGUMES FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN)

	Average[b] 1971-75 Moyenne	Average[b] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
		- tonnes -				
		- tonnes métriques -				
Asparagus[2]						Asperges[2]
Production	2812	2484	2163	2829		Production
Imports	5257	5805	6828	7087		Importations
Total supply	8068	8289	8991	9916		Approvisionnements
Processed[4]	5049	4477	4039	3948		Industrie[4]
Available for fresh use	3019	3812	4952	5968		Disponibles pour utilisation domestique
Net Trade	-5257	-5805	-6828	-7087		Commerce net
Beans, Green and Wax						Haricots, Verts et Jaunes
Production (fresh)	5049	6266	7294	9004		Production (frais)
Production (processing)	37854	40138	35178	38028		Production (de conserve)
Production (total)	42903	46404	42472	47032		Production (total)
Imports	7794	8106	9206	8903		Importations
Total supply	50697	54510	51678	55935		Approvisionnements
Processed	36924	40243	35451	38661		Industrie
Available for fresh use[4]	13773	14268	16227	17274		Disponibles pour utilisation domestique[4]
Net Trade	-7794	-8106	-9206	-8903		Commerce net
Beets						Betteraves
Production	18273	20065	19567	23128		Production
Imports[1]	435	1867	1195	863		Importations[1]
Total supply	18707	21932	20762	23991		Approvisionnements
Fresh exports	189	234	235	237		Exportations, état frais
Processed[4,9]	18267	10628	13900	a.		Industrie[4,9]
Available for fresh use	252	11070	6627	a.		Disponibles pour utilisation domestique
Net Trade	-246	-1633	-960	-626		Commerce net
Cabbage						Choux
Production	79601	121405	143579	156688		Production
Imports	50370	42856	35090	27195		Importations
Total supply	129972	164262	178669	183883		Approvisionnements
Fresh exports	1087	2021	1308	4312		Exportations, état frais
Processed[4]	14296	9202	8359	a.		Industrie[4]
Available for fresh use	114590	153039	169002	a.		Disponibles pour utilisation domestique
Net Trade	-49284	-40835	-53782	-22883		Commerce net

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- à suivre

TABLE 11. FRESH VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30, UNLESS NOTED OTHERWISE), CONTINUED
TABLEAU 11. LEGUMES FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), SUITE

	Average[b.] 1971-75 Moyenne	Average[b.] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
			- tonnes - - tonnes métriques -			
Carrots						Carottes
Production	173737	211471	256572	284795		Production
Imports	31287	40994	52876	53564		Importations
Total supply	205024	252466	309448	338359		Approvisionnements
Fresh exports	23397	30569	40781	49857		Exportations, état frais
Processed	39082	41132	40115	51999		Industrie
Available for fresh use[4]	142544	180765	228552	236503		Disponibles pour utilisation domestique[4]
Net Trade	-7890	-10425	-12095	-3707		Commerce net
Cauliflower						Choux-fleurs
Production (fresh)	16272	26012	30784	47631		Production (frais)
Imports	8527	13411	22178	21445		Importations
Total supply	24749	39423	52962	69076		Approvisionnements
Fresh exports	57	1113	2918	3136		Exportations, état frais
Processed[4,9]	2901	2337	3024	a.		Industrie[4,9]
Available for fresh use	21792	35974	47020	a.		Disponibles pour utilisation domestique
Net Trade	-8471	-12298	-19260	-18309		Commerce net
Celery						Celeri
Production	22124	27489	36144	33720		Production
Imports	62236	73208	81696	81404		Importations
Total supply	84361	100698	117840	115124		Approvisionnements
Fresh exports	499	1485	3402	5204		Exportations, état frais
Processed[4]	5523	4482	4218	a.		Industrie[4]
Available for fresh use	78339	94731	110220	a.		Disponibles pour utilisation domestique
Net Trade	-61737	-71723	-78294	-76200		Commerce net
Corn						Maïs
Production (fresh)	31003	38275	42120	46088		Production (frais)
Production (processing)	205888	218986	229503	278039		Production (de conserve)
Production (total)	236891	257261	271623	324127		Production (total)
Imports	14377	18804	16852	19886		Importations
Total supply	251268	276065	288475	344013		Approvisionnements
Processed[11]	206271	219098	224483	280854		Industrie[11]
Available for fresh use[4]	44997	56967	63992	63159		Disponibles pour utilisation domestique[4]
Net Trade	-14377	-18804	-16852	-19886		Commerce net

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- à suivre

TABLE 11. FRESH VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30, UNLESS NOTED OTHERWISE), CONTINUED
TABLEAU 11. LEGUMES FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), SUITE

	Average[b.] 1971-75 Moyenne	Average[b.] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
	- tonnes - - tonnes métriques -					
Cucumbers						Concombres
Production (field)	57210	63232	64889	61640		Production (des champs)
Production (greenhouse)[3]	8718	12170	15662	15971		Production (des serres chaudes)[3]
Production (total)	65928	75402	80551	77611		Production (total)
Imports	22059	33088	35836	31199		Importations
Total supply	87997	108489	116387	108810		Approvisionnements
Fresh exports	338	723	511	1451		Exportations, état frais
Processed[4]	46302	51181	51761	49204		Industrie[4]
Available for fresh use	41356	56585	64115	58155		Disponibles pour utilisation domestique
Net Trade	-21730	-32365	-35325	-29748		Commerce net
Lettuce						Laitue
Production (fresh)	30957	38513	40943	39152		Production (frais)
Imports	153032	196508	202789	199744		Importations
Total supply	183990	235021	243732	238896		Approvisionnements
Fresh exports	970	2029	2284	3489		Exportations, état frais
Available for fresh use	183019	232992	241448	235407		Disponibles pour utilisation domestique
Net Trade	-152062	-194479	-200505	-196255		Commerce net
Mushrooms[5]						Champignons[5]
Production (tonnes)	17553	23611	32709	35150		Production (tonnes métrique)
Imports	1213	676	1272	1536		Importations
Total supply	18766	24287	33981	36686		Approvisionnements
Processed[6,8]	7601	6583	8874	a.		Industrie[6,8]
Available for fresh use	11165	17704	25107	a.		Disponibles pour utilisation domestique
Net Trade	-1213	-676	-1272	-1536		Commerce net
Onions						Oignons
Production	95361	109788	129125	131621		Production
Imports	40660	55909	54203	47901		Importations
Total supply	136020	165698	183328	179522		Approvisionnements
Fresh exports	11812	15137	8647	11381		Exportations, état frais
Processed[4]	3124	2592	2153	a.		Industrie[4]
Available for fresh use	121084	147968	172528	a.		Disponibles pour utilisation domestique
Net Trade	-28847	-40772	-45556	-36520		Commerce net

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- à suivre

TABLE 11. FRESH VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30, UNLESS NOTED OTHERWISE), CONTINUED
TABLEAU 11. LEGUMES FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), SUITE

	Average 1971-75[b.] Moyenne	Average 1976-80[b.] Moyenne	1981	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
	- tonnes - - tonnes métriques -					
Green Peas						Pois Vert
Production[12]	65799	66682	62651	73380		Production[12]
Imports	975	1441	2268	2722		Importations
Total supply	66774	68123	64919	76102		Approvisionnements
Processed	61667	66379	63030	74809		Industrie
Available for fresh use[4]	5107	1744	1889	1293		Disponibles pour utilisation domestique[4]
Net Trade	-975	-1441	-2268	-2722		Commerce net
Potatoes						Pommes de Terre
Production (fresh)	2216242	2521584	2683180	2799700	2550210	Production (frais)
Imports (table)	130368	161625	152133	104285		Importations (table)
Imports (seed)	5261	13950	6750	7510		Importations (semence)
Imports (total)	135629	175574	158883	111795		Importations (total)
Total supply	2351871	2697158	2842063	2911495		Approvisionnements
Fresh exports (table)	37203	102778	188340	164412		Exportations, état frais (table)
Fresh exports (seed)	92585	112156	143631	101276		Exportations, état frais (semence)
Fresh exports (total)	129788	214934	331971	265688		Exportations, état frais (total)
Processed[4]	640993	780225	781710	a.		Industrie[4]
Used for seed (following year)[10]	237180	247566	254010	250920		Utilisées pour la semence (l'année suivante)[10]
Shrinkage	463593	530653	560468	576709		Perte
Available for fresh use	880317	923780	913904	a.		Disponibles pour utilisation domestique
Net Trade	-5841	39360	173088	153893		Commerce net
Rutabagas (Turnips)						Navets
Production (tonnes)	93623	100978	105112	103642		Production (tonnes métrique)
Total supply	93623	100978	105112	103642		Approvisionnements
Fresh exports	36719	34987	32658	33022		Exportations, état frais
Processed[4,8,9]	937	364	..	..		Industrie[4,8,9]
Available for fresh use	55967	65627	..	..		Disponibles pour utilisation domestique
Net Trade	36719	34987	32658	33022		Commerce net

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- à suivre

TABLE 11. FRESH VEGETABLES: SUPPLY AND DISPOSITION, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30, UNLESS NOTED OTHERWISE), CONCLUDED
TABLEAU 11. LEGUMES FRAIS: APPROVISIONNEMENTS ET REPARTITION, CANADA, 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN), FIN

	Average[b.] 1971-75 Moyenne	Average[b.] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
			- tonnes - - tonnes métriques -			
Spinach						Epinards
Production	2590	3098	2447	3249		Production
Imports	4838	7654	9494	8914		Importations
Total supply	7428	10752	11941	12163		Approvisionnements
Processed[4,7]	670	..	..	..		Industrie[4,7]
Available for fresh use	6758	..	..	..		Disponibles pour utilation domestique
Net Trade	-4838	-7654	-9494	-8914		Commerce net
Tomatoes						Tomates
Production (field)	32783	33429	33986	44071		Production (des champs)
Production (greenhouse)	13416	15515	14884	15072		Production (des serres chaudes)
Production (processing)	332090	404199	454614	477132		Production (de conserve)
Production (total)	378289	453143	503484	536275		Production (total)
Imports	103664	124403	127659	123253		Importations
Total supply	481953	577546	631143	659528		Approvisionnements
Fresh exports	528	697	442	657		Exportations, état frais
Processed	330855	404606	464322	489623		Industrie
Available for fresh use[4]	150570	172243	166379	169248		Disponibles[4] pour utilisation domestique
Net Trade	-103136	-123706	-127217	-122596		Commerce net

a. Not available until the spring of 1984.
Non disponible avant le printemps de 1984.
b. Average excludes any year for which the amount is not available.
La moyenne ne comprend pas toute année dont le montant n'est pas disponible.
1. From 1966 to 1975, estimates based on unloads at 12 markets are incomplete. For 1976 to date, calendar year totals apply.
De 1966 à 1975, les estimés (basés sur le déchargement sur douze marchés) sont incomplets.
De 1976 à ce jour les données des années civiles s'appliquent.
2. Crop year: May 1 to April 30.
Campagne agricole 1er mai au 30 avril.
3. Conversion: 1 doz. = 4.535 kg before 1975,
= 4.7627 kg in 1975,
= 5 kg in 1976 and 1977,
= 5.2163 kg in 1978 and 1979,
= 5.4431 kg from 1980 to date.
Conversion: 1 douz. = 4.535 kg avant 1975,
= 4.7627 kg en 1975,
= 5 kg en 1976 et 1977,
= 5.2163 kg en 1978 et 1979,
= 5.4431 kg de 1980 à ce jour.
4. Also includes fresh imports for processing (if any).
Comprend en outre les importations en frais destinées à la transformation (le cas échéant).
5. Calendar year.
Année de calendrier.
6. Fresh imports for processing are included for all years except 1970, 1972 and 1973.
Data source effective 1975 yields a substantially lower result than earlier source for the years 1973 and 1974.
Les importations en frais destinées à la transformation sont comprises pour toutes les années sauf 1970, 1972 et 1973.
A compter de 1975 la source de données présente un résultat sensiblement inférieur à celui de la source antérieure, pour les années 1973 et 1974.
7. Data not available after 1974.
Les données ne sont pas disponibles après 1974.
8. Data for 1975 and 1976 lack the quantity processed by frozen vegetable processors (not available).
Les données sur 1975 et 1976 ne comprennent pas les quantités transformées par les fabricants de légumes surgelés (non disponible).
9. Not available (confidential) after 1976.
Non disponible (confidentiel après 1976.
10. 20 percent of production plus 15 percent of imports.
20 pourcent de la production plus 15 pourcent des importations.
11. Source of 1975 data is S.C. 32-218.
La source des données de 1975 est Statistique Canada 32-218.
12. Mainly peas for processing.
Surtout des pois destinés à la transformation.

TABLE 12. PROVINCIAL VEGETABLE PRODUCTION[1], 1971-75 TO 1983
TABLEAU 12. PRODUCTION PROVINCIALE DE LEGUMES FRAIS[1], 1971-75 A 1983

	Average 1971-75[a] Moyenne	Average 1976-80[a] Moyenne	1981	Preliminary 1982 Provisoire	Preliminary 1983 Provisoire	
		- tonnes - - tonnes métriques -				
Newfoundland[6]						Terre-Neuve[6]
Cabbage	..	2471	2787	1772		Chou
Carrots	..	406	617	510		Carottes
Potatoes	..	5624	5670	4350		Pommes de terre
Rutabagas	..	5436	5802	3892		Rutabagas
Total	..	13937	14876	10524		Total
Prince Edward Island						Ile du Prince-Edouard
Beans, fresh	15	34	21	24		Haricots, frais
Beets	912	989	1294	1175		Betteraves
Cabbage	701	1092	2465	1293		Chou
Carrots	2293	2416	3062	2286		Carottes
Cauliflower	274	145	504	127		Chou-fleur
Corn, fresh	62	74	94	98		Maïs, frais
Cucumbers, field	132	103	499	249		Concombres, champs
Lettuce	89	82	188	245		Laitue
Parsnips	59	156	57	82		Panais
Peas, processing[10]	5679	4772	..	..		Pois, transformation[10]
Potatoes	447296	589450	734460	821393		Pommes de terre
Rutabagas	7167	4714	8395	4252		Rutabagas
Tomatoes, fresh,field	60	40	22	23		Tomates, frais,champs
Total	464740	604065	751061	831247		Total
Nova Scotia						Nouvelle Ecosse
Beans, processing[9]	5682	6469	9217	7325		Haricots, transformation[9]
Beans, fresh	89	99	150	133		Haricots frais
Beets	168	316	502	136		Betteraves
Cabbage	2540	2580	4565	4286		Chou
Carrots	8029	11323	20944	17799		Carottes
Cauliflower	234	268	476	363		Chou-fleur
Corn, fresh[2]	788	682	1075	982		Maïs, frais[2]
Cucumbers, field	410	324	533	664		Concombres, champs
Lettuce	308	235	215	258		Laitue
Parsnips	306	269	164	179		Panais
Peas, processing[7]	5367	10789	12006	12639		Pois, transformation[7]
Potatoes	25520	29756	33610	37060		Pommes de terre
Rutabagas	4935	3105	3526	3447		Rutabagas
Tomatoes, fresh,field	754	581	626	614		Tomates, frais,champs
Total	55129	66797	87409	85863		Total

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- à suivre

TABLE 12. PROVINCIAL VEGETABLE PRODUCTION[1], 1971-75 TO 1983 (CONTINUED)
TABLEAU 12. PRODUCTION PROVINCIALE DE LEGUMES FRAIS[1], 1971-75 A 1983 (SUITE)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Preliminary 1983 Provisoire
	- tonnes - - tonnes métriques -				
New Brunswick					
Beans, fresh[15]	59	77	439	197	
Beets	122	204	181	272	
Cabbage	1463	1980	2394	3404	
Carrots	1905	1410	2077	2803	
Cauliflower	175	324	1290	2722	
Corn, fresh	576	538	862	1267	
Cucumbers, field	247	248	278	272	
Lettuce	117	182	143	151	
Parsnips[4]	194	183	69	60	
Potatoes	552964	535940	600830	593466	
Rutabagas	3829	2868	3292	2741	
Tomatoes, fresh,field	399	269	245	333	
Tomatoes, processing[8]	260	248	176	383	
Total	562310	544472	612276	608071	
Quebec					
Asparagus	234	294	282	371	
Beans, processing	20698	20843	16337	17837	
Beans, fresh	1142	1591	1651	2813	
Beets	5041	6824	8012	13234	
Cabbage	24022	48685	57856	61152	
Carrots	64793	97269	111850	106211	
Cauliflower	2657	2865	3909	7681	
Celery	5480	7438	8727	10943	
Corn, processing	34626	36489	36982	47802	
Corn, fresh	12704	16962	19735	22244	
Cucumbers, field	13350	17327	19170	14727	
Lettuce	11887	18676	26249	22760	
Onions	26111	33214	36269	36451	
Peas, processing	11882	11797	9053	13481	
Potatoes	310664	368732	341800	387000	
Rutabagas	14918	18798	21276	24300	
Spinach	241	471	820	1320	
Tomatoes, processing	3044	1065	3407	4214	
Tomatoes, fresh,field	8750	8213	9712	13587	
Total	572246	717552	733097	808308	

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Nouveau-Brunswick[15]
Haricots frais
Betteraves
Chou
Carottes
Chou-fleur
Maïs, frais
Concombres, champs
Laitue
Panais[4]
Pommes de terre
Rutabagas
Tomates, frais,champs
Tomates, transformation[8]
Total

Québec
Asperges
Haricots, transformation
Haricots frais
Betteraves
Chou
Carottes
Chou-fleur
Céleri
Maïs, transformation
Maïs, frais
Concombres, champs
Laitue
Oignons
Pois, transformation
Pommes de terre
Rutabagas
Epinards
Tomates, transformation
Tomates, frais,champs
Total

- à suivre

TABLE 12. PROVINCIAL VEGETABLE PRODUCTION[1], 1971-75 TO 1983 (CONTINUED)
TABLEAU 12. PRODUCTION PROVINCIALE DE LEGUMES FRAIS[1], 1971-75 A 1983 (SUITE)

	Average[a.] 1971-75 Moyenne	Average[a.] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Preliminary 1983 Provisoire
			- tonnes - - tonnes métriques -		
Ontario					Ontario
Asparagus	2106	1726	1510	1634	Asperges
Beans, processing	7013	9339	5579	8437	Haricots, transformation
Beans, fresh	3560	3866	4714	5574	Haricots, frais
Beets	11230	10835	8937	7315	Betteraves
Cabbage	39982	52383	61077	68843	Chou
Carrots	80781	82539	104544	138050	Carottes
Cauliflower	10101	18633	20252	29506	Chou-fleur
Celery	13687	16756	23339	17334	Céleri
Corn, processing	146964	158757	172365	190509	Maïs, transformation
Corn, fresh	12189	13580	12957	15706	Maïs, frais
Cucumbers, field	40805	43674	42687	43369	Concombres, champs
Lettuce	10304	11029	9117	8845	Laitue
Onions	55636	64616	81495	79319	Oignons
Parsnips	2457	1918	1806	2200	Panais
Peas, processing	29792	29511	28350	32069	Pois, transformation
Potatoes	374596	424582	390180	384860	Pommes de terre
Rutabagas	53040	59078	55708	59011	Rutabagas
Spinach	2175	2406	1438	1627	Epinards
Tomatoes, fresh,field	20763	22126	21088	27789	Tomates, frais,champs
Tomatoes, processing	328038	402716	450417	471918	Tomates, transformation
Total	1245217	1430070	1497560	1593915	Total
Manitoba[12]					Manitoba[12]
Asparagus	82	73	83	132	Asperges
Beets	259	221	265	181	Betteraves
Cabbage	2888	3004	2453	3375	Chou
Carrots	6338	3935	5931	9806	Carottes
Cauliflower	520	493	1249	987	Chou-fleur
Celery	891	699	912	1542	Céleri
Corn, fresh[13]	1228	1134	..	..	Maïs, frais[13]
Cucumbers, field	298	273	598	1011	Concombres, champs
Lettuce	33	..	..	..	Laitue
Onions	4671	3124	4309	6361	Oignons
Parsnips	287	375	445	508	Panais
Potatoes	185066	263228	311672	263400	Pommes de terre
Rutabagas	2934	2452	2288	1905	Rutabagas
Tomatoes, fresh,field	330	117	151	20	Tomates, frais,champs
Total	205875	279128	328358	285228	Total

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- à suivre

TABLE 12. PROVINCIAL VEGETABLE PRODUCTION[1], 1971-75 TO 1983 (CONTINUED)
TABLEAU 12. PRODUCTION PROVINCIALE DE LEGUMES FRAIS[1], 1971-75 A 1983 (SUITE)

	Average[a.] 1971-75 Moyenne	Average[a.] 1976-80 Moyenne	1981	Preliminary 1982 Provisoire	Preliminary 1983 Provisoire	
	- tonnes - - tonnes métriques -					
Saskatchewan						Saskatchewan
Potatoes	20776	19766	17600	22410		Pommes de terre
Alberta						Alberta
Beans, processing[14]	..	..	..	..		Haricots, transformation[14]
Cabbage	2431	3124	4491	4681		Chou
Carrots	4838	5089	4899	5534		Carottes
Corn, processing[5]	9562	10944	11960	13192		Maïs, transformation[5]
Corn, fresh[13]	1516	2938	3513	2806		Maïs, frais[13]
Cucumbers, field	435	258	295	363		Concombres, champs
Onions	1251	1407	2232	1524		Oignons
Peas, processing[5]	5527	6290	7753	4605		Pois, transformation[5]
Potatoes	181438	169850	172430	191870		Pommes de terre
Rutabagas	2771	2151	2223	1696		Rutabagas
Total	209770	202051	209796	226271		Total
British Columbia						Colombie-Britannique
Asparagus	390	392	288	492		Asperges
Beans, processing	4461	3487	4045	4635		Haricots, transformation
Beans, fresh	183	598	319	263		Haricots frais
Beets	540	677	576	815		Betteraves
Cabbage	557[2]	6141	5491	7902		Chou
Carrots	4692	7085	4646	5796		Carottes
Cauliflower	2263	3285	3104	6245		Chou-fleur
Celery	2066	2597	3166	3901		Céleri
Corn, processing	14736	12691	8196	26536		Maïs, transformation
Corn, fresh	2186	3274	3885	2986		Maïs, frais
Cucumbers, field	1532	1024	829	985		Concombres, champs
Lettuce	8220	8309	5031	6913		Laitue
Onions	7692	7427	4820	7966		Oignons
Parsnips	105	100	216	298		Panais
Peas, processing	8689	7342	5489	10586		Pois, transformation
Potatoes	112338	114642	74980	93890		Pommes de terre
Rutabagas	2818	2376	2602	2398		Rutabagas
Spinach	174	222	189	302		Epinards
Tomatoes, fresh,field[3]	1728	2082	2142	1705		Tomates, frais,champs[3]
Tomatoes, processing[11]	748	284	614	617		Tomates, transformation[11]
Total	181132	184034	131242	185231		Total

a. Average excludes any year for which the amount is not available.
La moyenne ne comprend pas toute année dont le montant n'est pas disponible.

1. Mushrooms are excluded since separation of data by origin is limited to B.C. and 2 interprovincial regions. Greenhouse vegetables are excluded.
Les champignons sont exclus car les données ne sont séparées par source que pour la Colombie-Britannique, et deux régions interprovinciales. Les légumes de serre sont exclus.

2. Processing corn is included for 1975.
Le maïs de transformation est compris pour 1975.

3. Amount for 1977 is only approximate. Processing tomatoes are included in 1980.
Les données pour 1977 sont approximatives. Les tomates pour transformation sont comprises en 1980.

4. Data not available before 1971..
Les données non disponibles avant 1971.

5. Includes Manitoba.
Comprend le Manitoba.

6. Data are available for, and averages apply to, the period 1975-76 to date, only.
Les données et les moyennes s'appliquent seulement à la période de 1975-76 jusqu'à ce jour.

7. Also includes N.B. peas for all years and P.E.I. peas for 1971 and after 1976 (confidential).
Comprend aussi les pois du Nouveau-Brunswick pour toutes les années et ceux de l.-P.-E. pour 1971, et après 1976. La quantité pour 1971 n'est pas disponible.

8. Includes N.S.
Comprend la N.-E.

9. Includes P.E.I. and N.B. for all years and includes Prairies effective 1971.
Comprend l'Ile-du-Prince-Edouard et le Nouveau-Brunswick pour toutes les années et les provinces des Prairies depuis 1971.

10. Data not available in 1971. Included with Nova Scotia after 1976.
Les données ne sont pas disponibles en 1971 et incluses avec la Nouvelle-Ecosse après 1976.

11. Includes Maritimes in 1977.
Comprend les provinces Maritimes en 1977.

12. Manitoba lettuce data are not collected after 1975 (crop unimportant) and Manitoba parsnips data are not available before 1969.
Il n'y a pas de données pour les panais avant 1969. Les données pour la laitue ne sont pas disponibles, parce que la récolte n'a pas d'importance au Manitoba, après 1975.

13. Manitoba data (confidential) are included with Alberta for 1975 and after 1976.
Les données du Manitoba (confidentielles) sont incluses avec celles de l'Alberta pour 1975 et après 1976.

14. After 1970, included in Nova Scotia total. Includes Manitoba.
Après 1970, compris dans le total de Nouvelle-Ecosse. Comprend le Manitoba.

15. Includes P.E.I. in 1975. After 1976, included with N.S.
Y compris l'I.-P.-E. en 1975. Après 1976, les données sont incluses avec celles de la N.-E.

TABLE 13 - CANNED VEGETABLES AND PRODUCTS: SUPPLY, DISPOSITION AND AREA, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30)

TABLEAU 13 - LEGUMES ET PRODUITS EN CONSERVE: APPROVISIONNEMENTS, REPARTITION ET SUPERFICIE, CANADA 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN)

	Average 1971-75[10] Moyenne	Average 1976-80[10] Moyenne	1981	1982	1983	
			- tonnes - - tonnes métriques -			
Asparagus[1]						Asperges[1]
Stocks, April 1	1091	1207	1490	2639	3207	Stocks, 1er avril
Production	5741	5818	6851	5765	4124	Production
Imports[11]	385	448	462	222		Importations[11]
Total supply	7267	7473	8803	8626		Approvisionnements
Exports	831	1799	2198	2347		Exportations
Stocks, March 31	1481	1036	2639	3207		Stocks, 31 mars
Apparent domestic disappearance	4955	4638	3966	3072		Consommation domestique apparente
Net trade	446	1351	1736	2125		Commerce net
Contracted area for processing, Canada (ha)	742	575	409	331	453	Superficie sous contrat aux fin de transformation, Canada (ha)
Beans, Green						Haricots, Verts
Stocks, July 1	4227	6220	5998	6075	5606	Stocks, 1er juillet
Production	20539	18433	17538	17172		Production
Total supply	24765	24653	23536	23247		Approvisionnements
Exports	20.	507	179	104		Exportations
Stocks, June 30	5482	5446	6075	5606		Stocks, 30 juin
Apparent domestic disappearance	19082	18699	17282	17537		Consommation domestique apparente
Beans, Wax						Haricots, Jaunes
Stocks, July 1	3569	4319	4163	3412	3911	Stocks, 1er juillet
Production	17616	16476	15007	15624		Production
Total supply	21185	21295	19170	19036		Approvisionnements
Exports	1660	1259	1216	1123		Exportations
Stocks, June 30	4058	4378	3412	3911		Stocks, 30 juin
Apparent domestic disappearance	15467	15658	14542	14002		Consommation domestique apparente
Beans, Green and wax imports[7,11]	768	770	135	541		Haricots, Vert et Jaunes importations[7,11]
Contracted area for processing, Canada (ha)	9305	8160	6666	6923	6400	Superficie sous contrat aux fin de transformation, Canada (ha)

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- à suivre

TABLE 13 - CANNED VEGETABLES AND PRODUCTS: SUPPLY, DISPOSITION AND AREA, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30) CONTINUED.

TABLEAU 13 - LEGUMES ET PRODUITS EN CONSERVE: APPROVISIONNEMENTS, REPARTITION ET SUPERFICIE, CANADA 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN) SUITE.

	Average 1971-75[10] Moyenne	Average 1976-80[10] Moyenne	1981	1982	1983	
			- tonnes - - tonnes métriques -			
Beets						**Betteraves**
Stocks, July 1	1988	3251	3316	3132	2070	Stocks, 1er juillet
Production	8096	7481	5732	4418		Production
Total supply	10084	10732	9098	7550		Approvisionnements
Stocks, June 30	2474	3040	3132	2070		Stocks, 30 juin
Apparent domestic disappearance	7610	7692	5966	5480		Consommation domestique apparente
Carrots						**Carottes**
Stocks, July 1	1869	2632	1878	2198	2085	Stocks, 1er juillet
Production	4903	4712	4869	4740		Production
Imports[11]	3310	1913	782	728		Importations[11]
Total supply	10082	9258	7529	7666		Approvisionnements
Stocks, June 30	2166	2388	2198	2085		Stocks, 30 juin
Apparent domestic disappearance	7916	6869	5331	5581		Consommation domestique apparente
Net trade	-3310	-1913	-782	-728		Commerce net
Contracted area for processing, Canada (ha)[5]	854	920	801	1081	1180	Superficie sous contrat aux fin de transformation (ha)[5]
Corn						**Maïs**
Stocks, July 1	11112	19985	14336	14833	14209	Stocks, 1er juillet
Production	57194	58563	62055	64030		Production
Imports[11]	1189	1806	1647	1713		Importations[11]
Total supply	69495	80354	78038	80576		Approvisionnements
Exports	7941	9422	14482	12853		Exportations
Stocks, June 30	11572	19688	14833	14209		Stocks, 30 juin
Apparent domestic disappearance	49981	51244	48723	53514		Consommation domestique apparente
Net trade	6752	7616	12835	11140		Commerce net
Contracted area for processing, Canada (ha)	22631	20538	20649	22769	21177	Superficie sous contrat aux fin de transformation (ha)

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- à suivre

TABLE 13 - CANNED VEGETABLES AND PRODUCTS: SUPPLY, DISPOSITION AND AREA, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30) CONTINUED.

TABLEAU 13 - LEGUMES ET PRODUITS EN CONSERVE: APPROVISIONNEMENTS, REPARTITION ET SUPERFICIE, CANADA 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN) SUITE.

	Average 1971-75[10] Moyenne	Average 1976-80[10] Moyenne	1981	1982	1983	
			- tonnes - - tonnes métriques -			
Mushrooms[2]						Champignons[2]
Stocks, January 1[6]	1225	953	1705	1976	1659	Stocks, 1er janvier[6]
Production	8510	5136	7198	9732		Production
Imports[11]	11475	21788	24329	23813		Importations[11]
Total supply	21210	27877	33232	35521		Approvisionnements
Stocks, December 31[6]	1261	1020	1976	1659		Stocks, 31 décembre[6]
Apparent domestic disappearance	19949	26857	31256	33862		Consommation domestique apparente
Net trade	-11475	-21788	-24329	-23813		Commerce net
Peas, Green						Pois, Verts
Stocks, July 1	8256	17539	11929	9155	7819	Stocks, 1er juillet
Production	46176	39310	33528	36053		Production
Imports[4,11]	..	318	144	105		Importations[4,11]
Total supply	54432	57168	45601	45315		Approvisionnements
Exports	720	707	462	626		Exportations
Stocks, June 30	10032	15454	9155	7819		Stocks, 30 juin
Apparent domestic disappearance	43680	41006	35984	36868		Consommation domestique apparente
Net trade	..	389	318	521		Commerce net
Contracted area for processing, Canada (ha)	25724	21385	18956	21872	20346	Superficie sous contrat aux fin de transformation, Canada (ha)
Tomatoes						Tomates
Stocks, July 1	4225	7846	2905	6147	24037	Stocks, 1er juillet
Production	37708	42865	53861	75555		Production
Imports[11]	29078	28877	34195	22437		Importations[11]
Total supply	71010	79587	90961	104139		Approvisionnements
Stocks, June 30	4639	6978	6147	24037		Stocks, 30 juin
Apparent domestic disappearance	66371	72610	84814	80102		Consommation domestique apparente
Net trade	-29078	-28877	-34195	-22437		Commerce net
Contracted area for processing,						Superficie sous contrat aux fin de transformation,
Ontario (ha)	8458	9480	11392	11092	11185	Ontario (ha)
Canada (ha)	8955	9649	11544	11260	11466	Canada (ha)

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TABLE 13 - CANNED VEGETABLES AND PRODUCTS: SUPPLY, DISPOSITION AND AREA, CANADA, 1971-75 TO 1983 (CROP YEAR JULY 1 TO JUNE 30) CONCLUDED.

TABLEAU 13 - LEGUMES ET PRODUITS EN CONSERVE: APPROVISIONNEMENTS, REPARTITION ET SUPERFICIE, CANADA 1971-75 A 1983 (CAMPAGNE AGRICOLE DU 1er JUILLET AU 30 JUIN) FIN.

	Average 1971-75[10] Moyenne	Average 1976-80[10] Moyenne	1981	1982	1983	
			- tonnes - - tonnes métriques -			
Tomato, Juice						Tomates, Jus
Stocks, July 1	15538	20790	16361	21886	30923	Stocks, 1er juillet
Production	84571	103047	96024	92588		Production
Imports[11]	1441	1240	920	470		Importations[11]
Total supply	101550	125077	113305	114944		Approvisionnements
Exports	471	635	269	373		Exportations
Stocks, June 30	15729	21827	21886	30923		Stocks, 30 juin
Apparent domestic disappearance	85351	102616	91150	83648		Consommation domestique apparente
Net trade	-971	-605	-651	-97		Commerce net
Tomato Paste,Pulp and Puree						Tomates Pate,Pulpe et Puree
Stocks, July 1[8]	1959	1116	1698	2367	4506	Stocks, 1er juillet[8]
Production[9]	5507	3966	9920	16279		Production[9]
Imports[3,11]	23234	25632	25163	25331		Importations[3,11]
Total supply	30700	30713	36781	43977		Approvisionnements
Stocks, June 30[8]	2097	1310	2367	4506		Stocks, 30 juin[8]
Apparent domestic disappearance	28603	29403	34414	39471		Consommation domestique apparente
Net trade	-23234	-25632	-25163	-25331		Commerce net

1. Crop year April 1 to March 31.
Campagne agricole du 1er avril au 31 mars.

2. Calendar year.
Année du calendrier.

3. Paste only.
Pâte seulement.

4. Crop year data not available after 1965-66. Calendar year data apply from 1976 to date.
Les données de la campagne agricole ne sont pas disponibles après 1965-66. Les données de l'année civile, s'appliquent de 1976 à ce jour.

5. Data are available only for 1972-73 to date.
Les données sont disponibles seulement pour la période de 1972-73 jusqu'à ce jour.

6. Stocks not available prior to July 1972.
Stocks non disponibles avant juillet 1972.

7. Before 1976 comprises green and wax beans and other beans. For 1976 to date comprises green and wax beans only, but for calendar years. Data for 1973 to 1975 are ommitted due to doubtful continuity.
Avant 1976 comprend les haricots verts et jaunes et les autres types de haricots. Pour 1975 à ce jour, comprend les haricots verts et jaunes seulement, mais les années civiles.
Les données pour 1973 à 1975 sont exclues, leur continuité étant incertaine.

8. Adjusted stocks at June 1, 1979 and 1981 because July 1 stocks are not available.
Not available (confidential) for July 1 1976 to July 1 1978, inclusive.
Stocks ajustés au 1er juin, 1979 et 1981 car les données concernant les stocks au 1er juillet ne sont pas disponibles.
Non disponible (confidentiel) pour 1er juillet 1976 au 1er juillet 1978, inclusif.

9. Not available (confidential) for 1970-71 to 1972-73, 1974-75 and 1977-78.
Non disponible (confidentiel) pour 1970-71 à 1972-73, 1974-75 et 1977-78.

10. Average excludes any year for which the amount is not available.
La moyenne ne comprend pas toute année dont le montant n'est pas disponible.

11. Factor applied to convert canned imports, as published by Statistics Canada, to 'net weight' are : (1) Before 1971: 0.84.
(2) 1971-73: 1.00. (3) 1974 to date: 0.90.
Facteurs de conversion en poids net des données à l'importation des légumes en conserve publiées par Statistique Canada:
(1) Avant 1971: 0.84. (2) 1971-73: 1.00. (3) 1974 à ce jour: 0.90.

TABLE 14. HORTICULTURE CROPS: PRODUCTION AND FARM VALUE, CANADA, 1971-75 TO 1983
TABLEAU 14. RECOLTES D'HORTICULTURE: PRODUCTION ET VALEUR A LA FERME, CANADA, 1971-75 A 1983

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	Revised 1981 Revisé	Preliminary 1982 Provisoire	Estimated 1983 Estimé	
Total Fruit						Fruits
Production ('000 tonnes)	632	684	635	713		Production ('000 tonnes métrique)
Farm value ('000 dollars)	114897	199299	240969	270795		Valeur à la ferme ('000 dollars)
Total Vegetables						Légumes
Production ('000 tonnes)	3562	4108	4446	4723		Production ('000 tonnes métrique)
Farm value ('000 dollars)	325886	497693	680152	669740		Valeur à la ferme ('000 dollars)
Total Fruit and Vegetables						Fruits et légumes
Production ('000 tonnes)	4194	4792	5080	5436		Production ('000 tonnes métrique)
Farm value ('000 dollars)	440783	696992	921121	940535		Valeur à la ferme ('000 dollars)
Honey						Miel
Production ('000 tonnes)	22629	29244	34769	30527	34779	Production (tonnes métrique)
Farm Value ('000 dollars)	19146	36448	58505	50640		Valeur à la ferme ('000 dollars)
Av farm price (dollars/kg.)	.85	1.25	1.68	1.66		Prix à la ferme (dollars/kg.)
Maple Products						Produits de l'Erable
Production, expressed as Syrup in kiloliters	8348	9335	14221	8667	9103	Production en équivalent de sirop en kilolitres
Farm value ('000 dollars)	13142	24761	42589	28140		Valeur à la ferme ('000 dollars)
Av farm price (dollars/L.)	1.57	2.65	2.99	3.25		Prix à la ferme (dollars le L)
Greenhouse Floricultural Crops						Cultures Florales de Serre
Farm value ('000 dollars)	76746	156355	216904	214702		Valeur à la ferme ('000 dollars)
Nursery Stock and Services[1]						Plantes et Services de Pépinière[1]
Farm value ('000 dollars)	64112	130927	157945	135440		Valeur à la ferme ('000 dollars)
Total Horticulture Crops						Total des Récoltes d'horticulture
Farm value ('000 dollars)	613928	1045483	1397064	1369457		Valeur à la ferme ('000 dollars)

1. Incomplete due to lack of information on sales by producers dealing exclusively in sod. Effective 1966, includes sales by nurseries that also produce other nursery stock. Includes landscaping services, effective 1969, and garden seeds, effective 1971.

   Incomplèt à cause du manque de renseignements concernant les ventes effectuées par les producteurs qui s'occupent exclusivement de gazon. De 1966 comprend les ventes de gazon faites par les pépinières qui produisent aussi d'autres plantes.

SPECIAL CROPS

N.L. Longmuir

PULSE CROPS

DRY BEANS

SITUATION

Canadian dry bean production in 1983 is expected to decline about 42% from 1982 levels. As a result of poor export prospects, growers reduced planted area for both white pea and other speciality bean types in the spring (Table 1).

Ontario white pea bean production is estimated at about 36 300 t, down 44% from last year's level. The quality of the current crop is much better than last year's.

Alberta's dry bean area of 1 200 ha in 1983 was down sharply from the 1982 level of 3 300 ha and about half the 1976-80 level. Weak export markets and low grower prices caused the decline. Manitoba dry bean production is expected to be down 27% from year-earlier levels.

Exports of Canadian dry beans, especially white pea beans, totaled 58 107 t in the 1982-83 crop year, down 23% from the 1981-82 level of 75 086 t but just 9% below the 1976-80 average. The average unit export value was $385/t, down 48% from the $734/t of the previous year. Weak export demand and a world oversupply situation were the main reasons, as well as the fact that third world countries experienced foreign exchange shortages.

Exports of dry beans n.e.s. (not elsewhere specified) were 12 913 t, down sharply from the year-earlier level of 34 029 t.

Imports of dry beans totaled 11 088 t, down 3% from the 1981-82 level of 11 441 t and were even with the 1976-80 level. The average unit value was $853/t, down 20% from last year's level of $1,064/t. Imports include a fair quantity of seed beans, which are higher valued.

Producer returns for the 1982 crop of white pea beans in Ontario averaged $263/t, well below year-earlier levels of $677/t and 40% below the 1976-80 5-year average of $432/t.

OUTLOOK

Grower prices for the 1983 Canadian crop are expected to be well above the depressed 1982 level, given downward supply adjustment in North America. The U.S. crop is down about 45% and dealers are quoting prices of U.S. $630/t (f.o.b. Michigan) for Michigan navy beans while Ontario quotations are averaging $772/t (f.o.b. Plant).

The U.S. navy (white pea) bean crop is estimated to be about 210 000 t. Including the 68 000 t Michigan carryover, U.S. supplies are estimated at 278 000 t. Total North American supply is about 316 000 t, while expected world demand is about 340 000 t, indicating a tight supply-demand situation, and so grower prices are expected to remain strong.

Planted area of white pea beans in 1984 could increase substantially while the planted area for specialty beans (such as light and dark red kidneys, blocks, pinto, cranberry and small reds) is unlikely to increase. Many importing countries in Latin America are curtailing imports as a result of poor economic conditions and the need to conserve foreign exchange to service foreign debt.

DRY PEAS

SITUATION

In 1983, Canada's dry pea area was down 11% from 1982 levels of 70 010 ha, but was 63% greater than the 1976-80 average. Growing conditions in 1983 were not conducive to high yields, especially as a result of drought conditions along the Canada-U.S. border. Yields are expected to be down 10%. Production is estimated at about 109 900 t, down 18% from 1982 levels but 66% above the 1976-80 level (Table 2).

Exports of all dry peas for the 1982-83 crop year were 88 849 t, down 5% from the 1981-82 level but 80% greater than the 1976-80 level. Split dry pea sales were down 7% to 15 750 t, while whole dry pea sales were down 4% to 67 733 t. Unit export values for dry split peas averaged $389/t in 1982-83, compared with $383/t in 1981-82. Dry whole pea unit export values averaged $301/t compared with $362/t for the same period last year. Lower export prices in 1982-83 resulted from the higher North American production level and weak export demand.

Imports of all dry peas decreased 2% to 7101 t from the 1981-82 level. The average import value averaged $718/t, compared with the year-earlier level of $755/t. About 50% of the 1982-83 imports were made up of seed, compared with 70% in 1981-82, reflecting the weaker demand for planting seed.

During the 1982 marketing season, grower prices averaged $198.00/t, up from the 1981 average of $192/t.

U.S. yellow pea production in 1983 is estimated at 25 915 t, down 2% from the 1982 level but up 33% from the 1976-80 average. Yields were up about 12% despite planting reductions in the U.S. Planting reductions in the U.S. and Canada were necessary as a result of weak export demand in 1982-83.

NORTH AMERICAN YELLOW FIELD PEA PRODUCTION 1976-83 (t)

Crop	Canada[1]	U.S.[2]	Total
1976	45 042	17 010	62 052
1977	54 975	9 662	64 637
1978	79 742	41 504	121 246
1979	77 560	12 655	90 215
1980	76 000	16 284	92 284
1976-80	66 664	19 423	86 087
1981	110 220	29 470	139 690
1982	134 990	26 423	161 413
1983	109 900	25 915	135 815

[1]Statistics Canada
[2]USDA

OUTLOOK

Farm prices for the 1983 dry pea crop are likely to increase moderately throughout the marketing season. Buyers will likely continue their previous buying pattern of purchasing as needed. Dealers have adequate supplies to meet current demand expectations. Canadian dry pea area in 1984 will likely remain steady. Similarly, planted area of yellow peas in the U.S. is unlikely to increase. However, green pea area could increase, since export demand is good. Exports from the smaller 1983 crop will likely be down from 1982-83 levels, while export prices could strengthen moderately.

LENTILS

SITUATION

The 1983 Canadian lentil area decreased 13% to 52 600 ha, but was still well above the 1976-80 average of 16 000 ha. Production is estimated at 52 800 t, 31% below 1982 levels.

U.S. supplies are expected to be down 40% to 42 605 t, 23% below the 1976-80 average of 55 952 t. Most of the production decline can be attributed to decreased plantings in 1982 in response to weak export demand in the spring.

Initial contract prices (on the first 448 kg/ha) on the Prairies in 1983 were down from last year's level for the first 560 kg/ha. The Laird variety contracted for $300/kg, Chilean's $310/kg while Eston was $300/kg compared to last year's overall average of $397/kg.

Exports of lentils in 1982-83 totaled 42 779 t and were valued at $21 million. The average unit export value was $493.51/t.

NORTH AMERICAN LENTIL STATISTICS 1976-83 (t)

Crop	Canada[1]	U.S.[2]	Total
1976	290	43 450	43 740
1977	1 980	13 760	15 740
1978	10 610	59 950	70 560
1979	15 740	64 780	80 520
1980	25 500	97 820	123 320
1976-80	10 824	55 952	66 776
1981[3]	55 700	89 546	145 246
1982	76 600	71 088	147 688
1983	52 800	42 605	95 405

[1]Canada Grains Council, Alberta, Manitoba and Saskatchewan Departments of Agriculture, 1976-1980
[2]American dry Pea and Lentil Association and USDA
[3]Statistics Canada 1981-onward

OUTLOOK

Exports of the 1983 crop will likely be below the 1982 level. The crop was smaller but the quality was much better. Continued success of the Laird and Eston varieties could help expand export markets.

Average grower returns for the 1983 crop will be well above the initial price because market prices have strengthened due to the smaller North American crop. Export sales and prices for the remainder of the crop will depend on other lentil exporting countries such as Turkey (the largest producer). It is expected that 1984 initial contract prices will likely be competitive with alternative crops and that planted area will likely increase in line with export demand by about 10-15%.

MUSTARD

SITUATION

Mustard seed production in 1983 is estimated at 90 900 t, up 13% from last year despite the 18% increase in planted area. Yields were above average as a result of the hot summer weather on the Prairies. The

quality of the 1983 crop is about average. Overall North American supplies are very tight, since U.S. production was adversely affected by the drought (Table 3).

On the Prairies 1983 contract prices for yellow mustard averaged $260/t compared with $330/t in 1982. Brown mustard averaged $230/t compared with $287/t, while Oriental was contracted for $220/t compared with $276/t last year. These contract prices were based on a Canada Number 1 grade with discounts for lower qualities.

Mustard seed exports during the 1982-83 crop year were 74 199 t up 7% from last year's shipments of 69 213 t and 10% above 1976-80. The average unit export value was $440.24/t, an increase of 13% from the year earlier level of $390/t. Producer prices for the 1982 crop averaged about $265/t, compared with $352/t in 1981, but about 13% higher than the 1976-80 average.

OUTLOOK

As a result of the very tight North American supply situation, grower prices have increased, especially for the non-contracted portion of the crop. Contract prices in the spring of 1984 will likely reflect the tight supply situation but will be very responsive to export demands. Initial contract prices are likely to increase 30% to encourage growers to maintain plantings. Recovery of U.S. production will be a key factor in next year's pricing activity.

BUCKWHEAT

SITUATION

Canadian buckwheat area in 1983 decreased about 17% to 46 100 ha. Quebec's planted area increased 9% to 9 700 ha, while Manitoba's area decreased 22% to 36 400 ha. Manitoba yields will be better than last year's (when frost destroyed half the crop), but still will not be as high as originally expected. Yields in Quebec were about average. The overall yield for Canada will likely be about 779 kg/ha. Total production is unlikely to exceed 35 900 t.

Buckwheat exports in 1982-83 decreased to 17 853 t from 27 996 in 1981-82 and were well below the 1976-80 average (Table 4). The decrease in exports can be attributed to the sharp drop in Manitoba supplies as a result of frost in August 1982. Exports to Japan, our major market, dropped 61% from year-earlier levels to 15 561 t.

Producer prices averaged about $333/t during the 1982-83 marketing year, up 3% from the previous year and about 75% above the 1976-80 average of $190/t. Contract prices in 1983 for the large seeded varieties average about $275/t.

OUTLOOK

It is unlikely that Manitoba's planted area in 1984 will increase unless additional export markets are developed, while the Quebec area is expected to increase. Initial investigations in Europe appear to be favorable, especially for lower quality product. Japan usually consumes about 90 000 t per year of which 80 000 is imported. Import requirements from Canada are only about 30 000 t per year.

Grower prices are unlikely to increase, despite lower Canadian and U.S. production. China has become a very agressive seller of buckwheat and has abundant supplies to deliver to Japan. Export competition with the U.S. is very active, and Brazil is usually a supplier of lower priced product for the balance of the market.

TOBACCO

WORLD SUMMARY

Consumption in 1983 could increase about 1.4% to a record 5.35 million tonnes. World stocks will likely be unchanged as of December 31, 1983 at a record level of 7.3 million tonnes, compared with a 12% increase last year. Production in 1983 is down 12% from 1982, while world trade is down less than 1% from the 1982 level of 1.42 million tonnes. Canada accounted for about 3% of world exports of flue-cured tobacco in 1982, compared with 5% in 1981. The reduction resulted from the crop shortfall in 1982 which resulted from an early frost. Reduced imports are expected because major importing countries have seen significant reductions in cigarette consumption. The continuing trend of purchasing only the best quality tobacco is evident in many auction markets despite lower world interest rates. Higher retail prices (due to increases in taxation) in many countries and the depressed world economy has reduced cigarette demand. World cigarette output (excluding China) actually registered a decline (about 1%) in 1983. Including China, cigarette output increased slightly (0.2%) to 4.59 trillion pieces.

U.S. SUMMARY

On July 25, 1983 President Reagan signed the Tobacco Price Support Stabilization Act of 1983 and set the support levels for eight other classes of tobacco at their 1982 levels for 1983. The plan is officially known as the "Buyers Incentive Purchase Program for 1983 Flue-cured Tobacco". The No-Net-Cost fund is supported by a 15.43¢/kg assessment on growers and allotment holders. Individual buyers must exceed their sales of the previous 3 years to qualify for the full rebate. If the 1983 marketing quota of 404 605 t is sold to the trade, the program could reimburse about $48 million.

Production of U.S. flue-cured tobacco declined in 1983 as a result of lower yields and a lower marketing quota which reduced plantings. Flue-cured production could reach 400 000 t, down 10% from 1982, while burley tobacco is down about 18% to 288 485 t.

Flue auctions were operating by July 27, 1983. The quality of the 1983 crop is described as less desirable than the 1982 crop. As a result, poor quality tobacco grade prices are low while better quality tobacco grades received fairly high bids. The overall auction averaged about $3.929/kg compared to the support level of $3.746/kg, while 1982 crops averaged $3.935/kg.

EUROPEAN ECONOMIC COMMUNITY SUMMARY

The European Economic Community is expected to import about 506 000 t of tobacco in 1983, up about 4% from 1982, to account for about 35% of world trade. The 1983 imports have declined 10% in comparison to the 1976-80 average of 556 198 t. Imports to the U.K. declined 3%, while French imports increased 31% and the imports to the Federal Republic of Germany increased 12% to account for 32% of all EEC imports.

Canadian exports to the EEC from the 1982 crop totaled 16 402 t, down 20% from the 1981 level. Canadian exports accounted for 3.4% of total world exports to the EEC, compared with 3.8% in 1982.

CANADA

Situation

The 1983 marketing target for flue-cured tobacco in Ontario was set at 97 500 t, down 10% from the 1982 target. The Quebec crop is estimated at 6 500 t, about the same as last year, while Maritime production was up about 5% to 4 500 t. Total 1983 Canadian flue-cured tobacco marketings could approach 108 500 t, up 60% from the low 1982 crop. The quality of this year's crop is very good despite the extremely wet spring and dry summer. The majority of the crop was Delgold.

The average price paid to Canadian flue-cured tobacco producers for the 1982 crop was $3.55/kg, up 5.4% from the 1981 crop average of $3.37. However, the value of the crop declined 36% to $239.8 million (as a result of the early August frost in 1982 which destroyed about half the Ontario crop) from the 1981 value of $372.8 million and was 6% under the 1976-80 average of $251.7 million.

The Ontario Flue-cured Tobacco Growers' Marketing Board negotiated a minimum guaranteed price of $3.55/kg for the 1983 crop, compared with $3.44/kg in 1982. Auction prices for the 1983 crop in Quebec and the Maritimes averaged $3.49/kg and $3.50/kg respectively. Ontario opened its three auction exchanges on October 3, 1983. Auction prices are expected to reflect the world market price, as 45% of the crop is

destined for export markets. The world oversupply situation will likely mean that the final auction price will be slightly higher than the guaranteed price.

Canadian cigarette production in 1983 is expected to decrease to 65.3 billion pieces, compared with 68.2 billion in 1982, but this is still 1.7% higher than the 1976-80 average of 64.1 billion. Total sales of domestically produced cigarettes in 1983 could slip to 63.9 billion, down 4% from the 66.3 billion sold in 1982 but still 4% higher than the 1976-80 average of 61.5 billion.

Canadian cigar production in 1983 will likely decline to 329.2 million cigars from the 1982 level of 403.7 million and 30% below the 1976-80 average of 469.2 million. Sales are expected to dip to 343.0 million, well below the 1976-80 average.

Consumption of cigarettes and cigars declined in 1983, primarily as a result of an increased consumer awareness of smoking-related health risks in reaction to increasing prices. However, it should be noted that the production and sale of fine cut tobacco for the roll-your-own sector has increased about 11% in 1983 over 1982 levels.

Trade summary

The value of Canadian tobacco and tobacco products exported in 1983 will be lower than last year's $141 million because flue-cured exports have declined, despite the large shipment to Egypt in early 1983. During the 1976-80 period, the value of exports averaged $94.2 million. The 1983 imports are expected to increase 33% from the 1982

SALES OF CANADIAN TOBACCO PRODUCTS 1971-1984

Period	Cigarettes	Cigars	Tobacco	
			Fine cut	Other
	- millions -		- tonnes - redried weight -	
1971-75	54 779	575.5	6 999	1 276
1976-80	61 539	450.2	5 713	830
1981	66 560	438.5	4 765	721
1982	66 339	381.2	5 552	309[3]
1983[1]	63 925	343.0	6 185	305
1984[2]	63 600	337.0	6 496	300

[1]October 1 estimate (author)
[2]October 2 forecast (author)
[3]New definition (only smoking tobacco)

Source: Statistics Canada, Catalogue No. 32-032

level of $50 million and be well above the 1976-80 average of $28 million. This increase in import value can be attributed to the importation of larger quantities of flue-cured tobacco in 1983 to augment domestic stocks to supply the manufacturing industry. Domestic inventories were down as a result of the early August frost in 1982 which destroyed about 40% of the Ontario crop.

Outlook

Total world supplies of leaf tobacco will be more than adequate to meet anticipated world demand, since carryover stocks are sufficient to last more than 1 year. Grower prices are unlikely to increase because consumption is declining. Similarly, the economic recovery is expected to be very gradual, thus limiting future demand expansion for tobacco products especially with taxation accentuating an upward movement in prices in most parts of the world in the early 1980s.

The 1984 price support system in the U.S. will likely remain steady and production is not expected to increase. Export pricing will be highly competitive as exporters try to maintain or expand market shares in a shrinking market.

The 1984 Canadian sales of domestically produced cigarettes are expected to decline to 63.6 billion pieces while cigars could drop to 337 million. Fine-cut tobacco for cigarettes is likely to increase 5% to 6496 t. Domestic demand for manufacturing cigarettes and other tobacco products utilizing flue-cured tobacco is expected to decline. Similarly, export demand will likely decline except for higher quality tobaccos. However, buyer acceptance of the Delgold variety has been beneficial to growers and prices are likely to reflect a modest increase. Flue-cured production in 1984 will likely be in line with market demands.

The production of Burley tobacco will likely remain steady with no price change, while cigar and pipe tobacco area will remain small in response to market conditions.

Exports in 1984 are expected to recover, since some 44 000 t of tobacco from the 1983 crop is destined for export markets. Imports are likely to decline, as domestic supplies of flue-cured tobacco are adequate to meet the expected requirements for cigarette and fine-cut production and replenish inventories.

SWEETENERS

SUGAR

WORLD SITUATION

World sugar production during the 1982-83 (September 1-August 31) crop year was estimated by F.O. Licht at 99.8 million tonnes, raw value (96° Polarization), 700 000 t below that of the previous season.

World sugar consumption was estimated at 94.2 million tonnes, raw value, about 2.3 million more than in the 1981-82 season. Thus year-end stocks (August 31, 1983) were up 16% to 37.9 million tonnes. The closing stock to consumption ratio was up again and represents an extra 146 days of consumption, well above the normal 91 day level.

World sugar prices during the 1982-83 season declined as a result of large surplus stocks which overshadowed the market. World sugar prices started with a seasonal low of U.S.12.68¢/kg in September 1982 and peaked in July 1983 at U.S. 24.12¢/kg when South Africa was making up some shortfalls in production to cover long-term export contracts. The average for the season was U.S 17.03¢/kg, down 27% from the previous year's price of 23.21¢/kg.

Overall, the world free market raw sugar price averaged U.S. 13.56¢, 14.20¢, 16.52¢ and 23.85¢ per kilogram for each quarter starting with September-November 1982 and ending June-August 1983. Prices fluctuated between a low of U.S. 15.59¢/kg in November 1977, to a high of 89.62¢/kg in October 1980. The overall 1982-83 price was near the lower end of the 5-year range and averaged 56% lower than the 5-year simple average.

World prices for raw cane sugar in September and October fluctuated around U.S. 22.05¢/kg but weakened in November to about 18¢/kg.

INTERNATIONAL POLICY DEVELOPMENTS

United States

The sugar import quota system signed by President Reagan in May 1982 was adjusted in September 1983 for the 1983-84 period beginning September 26, 1983. The annual quota was set at 2.678 million tonnes, up 5% from the 1982-83 level. The system recommends acceptable delivery patterns for all quota holders as well as a requirement for certificates of quota eligibility. Canada received 29 438 t in 1983-84, compared to 27 941 last year or 1.1% of the base figure.

In another program development, the market stabilization price (MSP) for raw cane sugar was set at 46.67¢/kg for the 1983-84 sugar loan program, effective October 1. The loan rate for raw cane sugar was increased by a half cent per pound while handling charges and incentive rates remained unchanged. Transportation and interest components declined.

The final regulation amending the Sugar Program was issued by the United States Department of Agriculture (USDA) effective June 28, 1983 to allow for the import of quota-exempt sugars, syrups, and molasses, when an equivalent quantity of sugar is reexported in refined form. A limit of 25 401 t per licence is permitted on a revolving basis, provided the refined product is reexported within three months from the date of import. Refiners must post a bond equal to 1.5 times the

WORLD SUGAR SUPPLY AND DISPOSITION, CROP YEARS 1980-81 TO 1983-84[1]

Crop Year	1980-81	1981-82	1982-83	1983-84[2]
		- '000 t, raw value) -[3]		
Opening stocks (Sept. 1)	25 174	24 325	32 704	37 860
Production	88 077	100 549	99 852	94 000
Trade	28 478	31 926	29 145	32 000
Consumption	89 381	91 864	94 155	94 500
Closing stocks (Aug. 31)	24 325	32 704	37 860	37 360
		- percentage -		
Closing stocks Consumption ratio	27.21	35.60	40.21	39.16
		- U.S. ¢/kg -		
Average LDP price[4]	55.53	23.21	17.03	17-24[5]

[1]F.O. Licht, Fourth Estimate 1982-83.
[2]Forecast made by author.
[3]Raw value, 96° polarization
[4]Simple average London Daily Price converted to f.o.b. Caribbean port, in bulk.
[5]Expected price range, given supply-demand situation.

WORLD RAW SUGAR PRICES 1980-81 TO 1982-83[1]

Crop year quarterly September to August	1980-81	1981-82	1982-83
		- ¢/kg -	
1st Q (Sept.-Nov.)	83.95	26.61	13.56
2nd Q (Dec.-Feb.)	60.74	28.88	14.20
3rd Q (March-May)	41.25	21.56	16.52
4th Q (June-Aug.)	36.22	15.78	23.85
Season (Sept.-Aug.)	55.53	23.21	17.03

[1]International Sugar Organization monthly price calculations.
[2]Simple average London daily price converted to f.o.b. Caribbean port, in bulk converted to Canadian ¢ per kilogram from the quotation in U.S. ¢/lb.

difference between the No. 11 World Price and the No. 12 New York spot price or between the No. 11 World price and the MSP, whichever difference is greater. Bonding is not required if the sugar equivalent is exported prior to importing the quota-exempt sugar.

U.S. MARKET SUPPORT PRICE COMPONENTS

Items	1981-82	1982-83
	- ¢/kg -	
Loan rate for raw cane sugar	37.48	38.58
Handling charge	1.19	1.19
Freight	4.67	4.59
Interest at 9.75% for 6 months	1.92	1.87
Incentive to market sugar	0.44	0.44
MSP	45.70	46.67

President Reagan signed Proclamation No. 5071 effective June 29, 1983 banning the import of blended sugars in liquid and dry form. Under the proclamation an import quota of zero was established for blended syrups: TSUS (tarif item) 155.75 containing sugar derived from sugarcane or sugarbeets and not packaged for retail sales; TSUS 156.45 containing over 65% sugar (dry weight) and not packaged for retail; and a number of other smaller categories. The embargo was undertaken as a result of increasingly large shipments containing slightly less than 94% liquid sucrose and 42% HFCS.

European Economic Community

After a lengthy consultation period, the meeting of EEC Agriculture Ministers agreed to increase the institutional prices for farm produce in the Community for 1983-84 (July 1-June 30) by an overall average of 4.2%. Since sugar has been a surplus crop in recent years its rate was increased by 4%.

CANADIAN SITUATION

Sugar beet growers in Canada averaged $47.79/standard tonne of beets (equivalent to 125 kg of refined white sugar/t of beets) for the 1981 crop, compared to the 1980 crop price of $69.10. Wholesale prices of refined sugar from the 1981 crop were depressed because of lower world market prices for raw sugar in 1982.

As a result of the low producer price, the 1981 sugar beet crop was designated for support under the Agricultural Stabilization Act on September 30, 1983. A payment of $5.66 per standard tonne was announced based on a support price calculated at the 90% level of the previous 5-year market price and indexed for changes in the cash costs of production (Table 6).

Production of refined beet sugar from the 1982 Canadian crop declined 11% to 116 216 t from the 1981 crop of 130 310 t, down 3% from the 1976-80 average of 119 811 t.

Stocks of refined beet sugar held by Canadian refiners on September 1, 1983 totaled 21 369 t, up 29% from the 16 536 t held a year earlier, but 49% less than the 1976-80 average of 43 280 t. Stocks were up because of higher production in Manitoba in 1982.

Stocks of refined cane sugar were 70 766 t, up 49% from 1982 but 3% below the 1976-80 level of 72 768 t. Stocks of raw cane sugar were up 63% to 87 345 t but 17% below the 1976-80 average of 104 610 t. Refining companies continue to limit stock levels to trim operating costs. Furthermore, they are confident that adequate supplies are available from traditional suppliers.

The 1983 harvested area of sugar beets in Canada increased about 8% over the 1982 crop as a result of a larger Quebec area. Production is estimated at 1 179 912 t, compared to 1 018 037 t last year, and is 21% above the 1976-80 average (Table 7). Yields were below average in Manitoba and Alberta as a result of the hot dry summer, while Quebec yields are about average despite delayed spring plantings.

Net imports were down in 1983 as a result of lower domestic consumption of sugar and the continuation of cost-reducing measures by the refiners. However, raw sugar acquisitions from January to August, 1983 totaled 579,433 t, up 14% from the year-earlier period when 508 708 t were acquired, and 6% above the 1976-80 average of 545 725 t.

Canadian sugar consumption in 1982 was 38.31 kg per capita (retail weight), a 1% increase over the 1981 level of 37.77 kg, but about 7% less than the 1976-80 average of 41.26 kg.

Retail sugar prices have fluctuated in response to wholesale price movements. Wholesale prices in Canada are determined by the free world market price. As a result of the continuation of excess world supplies, world prices have trended down in 1983, but have been fluctuating around the U.S. 20¢/kg level during the last quarter of 1983.

INTERNATIONAL SUGAR AGREEMENT (ISA)

During 1983 two sessions of the UNCTAD Sugar Conference were held in Geneva, Switzerland to negotiate a new ISA. These meetings were not successful and a third session is to be held in March 1984.

The new agreement's basic objective is to avoid extremes in world sugar prices, recognizing that such extremes are not in the long-term interests of the producer or consumer. The negotiations revolved around the pricing mechanism and trigger points. About 12 separate proposals were examined. However, agreement on a precise formula was not reached. It was agreed that the Paris price of white sugar would be included in the calculation of the ISA daily price in any new agreement. In this way refined white sugar would be accounted for in the pricing mechanisms. Refined white sugar trade accounts for about 40% of world market trade in sugar.

In order to improve the new agreement, efforts were made to arrive at a new security stocking arrangement whereby up to 6 million tonnes of sugar would be stockpiled to aid in the regulation of prices. It was pointed out that this additional 3.5 million tonnes above the limit of the 1977 Agreement would be expensive to finance. Stock verification was also considered as well as many of the problems with verification.

The final key factor discussed was the concept of export entitlements. The discussion revolved around the European Economic Community concept of three groups of exporters: namely, one large group (called the Big 10), a group of medium exporters and a group of small exporters. After a lengthy debate it became apparent that members of the small group would each be granted up to 150 000 t, raw value. The middle group negotiated the concession that expansion projects now underway would be favorably dealt with to allow for entitlement adjustments. The larger group or Big 10 had also explored the range of acceptable member shares but still had to work out an acceptable compromise on how to trigger increases/decreases in relationship to demand and supply.

OUTLOOK

World sugar production in 1983-84 is expected to decrease 6% to about 94.0 million t. Beet sugar production will fall to 34 million tonnes, while cane production could be up one million tonnes. World consumption is expected to remain steady at 94.5 million tonnes. Given this situation, world stocks are likely to remain steady at around 37.3 million tonnes to August 31, 1984, or 39.5% of consumption.[1] The world price of sugar is expected to remain low and fluctuate between U.S. 18-24¢/kg in response to seasonal production and consumption estimates during the course of the marketing season.

[1]The world free market price is usually very responsive to movements of the closing stock-to-consumption ratio of 25%. Above 25%, prices usually decline while below 25% prices usually rise.

The contracted Canadian area in 1984 will likely increase about 3% as a result of expansion in Quebec, where a target of 7600 ha is expected. The Manitoba and Alberta areas will likely maintain 1983 levels. Consumer demand in the prairie region has remained fairly steady.

Grower returns for the 1982 crop were about the same as in 1981 and wholesale sugar prices were lower for most of the selling period. The persistence of the world oversupply situation into 1984 will mean that grower returns for the 1983 beet crop will also be low.

As a result of declining raw sugar requirements, Westcane Sugar Ltd of Oshawa Ontario was sold to Atantic Sugar of Montreal, and St. Lawrence Sugar Ltd of Montreal has laid off some staff. In addition La Raffinerie de Sucre du Québec has increased its marketing activities as a result of its recent plant expansion. The 1984 production target is expected to increase by 72 000 t of sugar beets. Net imports in 1984 could decline 13% from 1983 levels.

HFCS

High fructose corn sweetener (HFCS) capacity will remain steady since three plants are now onstream. However, they will now act as one unit, with Canada Starch Company controlling 70% of the new company and John Labatt Limited holding the remaining 30%. Redpath Industries Ltd recently sold its 50% share of Zymaize Company after enduring heavy losses over the last three years as a result of low world sugar prices.

HFCS margins will be narrow because corn supplies in North America are down as a result of stronger raw input costs. On the other hand, by-product prices for 60% protein meal, 21% protein feed and crude corn oil look encouraging.

OTHER SWEETENERS

ASPARTAME

The increased acceptance of aspartame as a low-calorie sweetener in soft drinks will also have an impact on sugar demand in North America. Soft drink manufacturers indicate that demand is increasing especially in the U.S. where Coca Cola Ltd and Pepsico have recently announced the use of Aspartame and Aspartame blends in their diet soft drinks. Canadian bottlers of soft drinks have experienced a positive growth in diet-drink demand and expect this trend to continue.

SUPPLY AND DISPOSITION OF SUGAR IN CANADA, 1971-75 TO 1984

Calendar year	Production	Imports	Exports	Net imports	Consumption	Year-end stocks
	(tonnes, raw value, 96° polarization)					
1971-75	122 051	981 706	44 917	936 788	1 068 648	381 992
1976-80	131 761	1 022 592	93 541	928 651	1 063 012	404 840
1981	99 316	906 629	138 345	768 284	940 912	273 173
1982	129 485	912 423	96 567	815 856	939 642	278 872
1983[1]	133 693	996 802	50 000	946 802	1 073 959	285 308
1984[2]	138 038	864 034	45 000	819 000	1 022 380	265 000

[1]November 1, 1983 estimate
[2]First 1984 forecast

ESTIMATED DOMESTIC DISAPPEARANCE OF SWEETENER, 1976-1984

Calendar year	Sugar[1]	Maple sugar[1]	Honey[1]	Other[1]	Total[1]
	(tonnes - retail weight)				
1976-80	969 292	5 434	21 212	9 740	1 005 678
1981	920 150	9 250	27 000	8 710	955 890
1982	943 420	3 710	21 020	N/A[4]	968 158
1983[2]	998 782	3 925	23 000	N/A	1 025 707
1984[3]	950 814	4 400	25 000	N/A	980 214

[1]Source: Statistics Canada, apparent per capita food consumption in Canada, Part 1, Catalogue 32-229.
[2]Estimates for 1983 are based on partial data of shipments, imports and exports.
[3]Forecast for 1983
[4]Confidential

MAPLE PRODUCTS

SITUATION AND OUTLOOK

Maple syrup production in 1983 was 8565 kL, 5% above the small crop of 1982 but 8.25% below the 5-year average. Production in Quebec, which accounted for 90.7% of the 1983 crop, was 6% higher than in 1982. For the second year in a row, the combination of a significant inventory, which reduced the number of taps, and poor weather resulted in a below-average volume. Prior to 1982, the number of taps in Quebec had increased for several years. In 1983, 13.6 million Quebec taps averaged 0.61 L of syrup per tap versus 13.4 million with a yield of 0.58 L in 1982. Both years were poor. However, in 1983 43.5% of the crop was in the top two grades versus only 28.4% in 1982.

The average 1983 farm price for bulk syrup sales to processors in Quebec, while not final, will be slightly above the $2.07/L received in 1982. Bulk syrup processors continue to hold an average inventory of syrup. It is expected that the burdensome inventory of recent years will be reduced before the start of the 1984 season. Sales to the U.S. have declined in recent years. Quebec producers' direct syrup sales averaged $3.47/L in 1983, down from $3.51/L in 1982.

Despite the second small crop in a row, an above-average inventory will keep supplies adequate and limit price increases until next season. With an improved economy, changes in the demand for maple can be anticipated. The volume of maple sugar produced in 1983 was down, but taffy and butter production was up. The decline in maple sugar production was most significant with a price increase of 15.4%. Average producer returns for all sales in 1983 are estimated to be similar to the $3.01/L received for the 1982 crop. Returns from the 1984 crop should increase, since stocks are low and the economy has improved. Major price increases are not anticipated as the product must compete with low-priced table products and a "luxury" image.

HONEY

SITUATION AND OUTLOOK

Canadian honey production is estimated at approximately 34 779 t for 1983 compared with 30 528 in 1982. This estimate suggests an increase of approximately 19% over the 5-year (1976-80) average. Yields per colony in most provinces will be above those of 1982 with the exception of Manitoba and British Columbia. The number of beekeepers increased although the number of colonies declined. There were 21 210 beekeepers with 663 350 colonies in 1983. Quebec continues to increase the number of colonies while Ontario colony numbers are on the decline. Both provinces have many small producers selling directly to consumers.

Industry estimates of current inventories suggest a continuation of the buildup of stocks. Exports for the first six months of 1983 were 3.7% less than the previous year. Growers' bulk sales, at about $1.23/kg, are down approximately 9% from last year. Retail prices in Ontario as reported by producers currently range from a high of $4.39/kg in some major centers to $3.25/kg in some smaller towns for white, No. 1 creamed honey. On the lower end of the scale this represents a decrease of approximately 13% from last year's. Producer prices for liquid sales are approximately $2.42 to $2.60/kg. Given lower bulk prices, there is a good possibility that retail prices will decline over the next year.

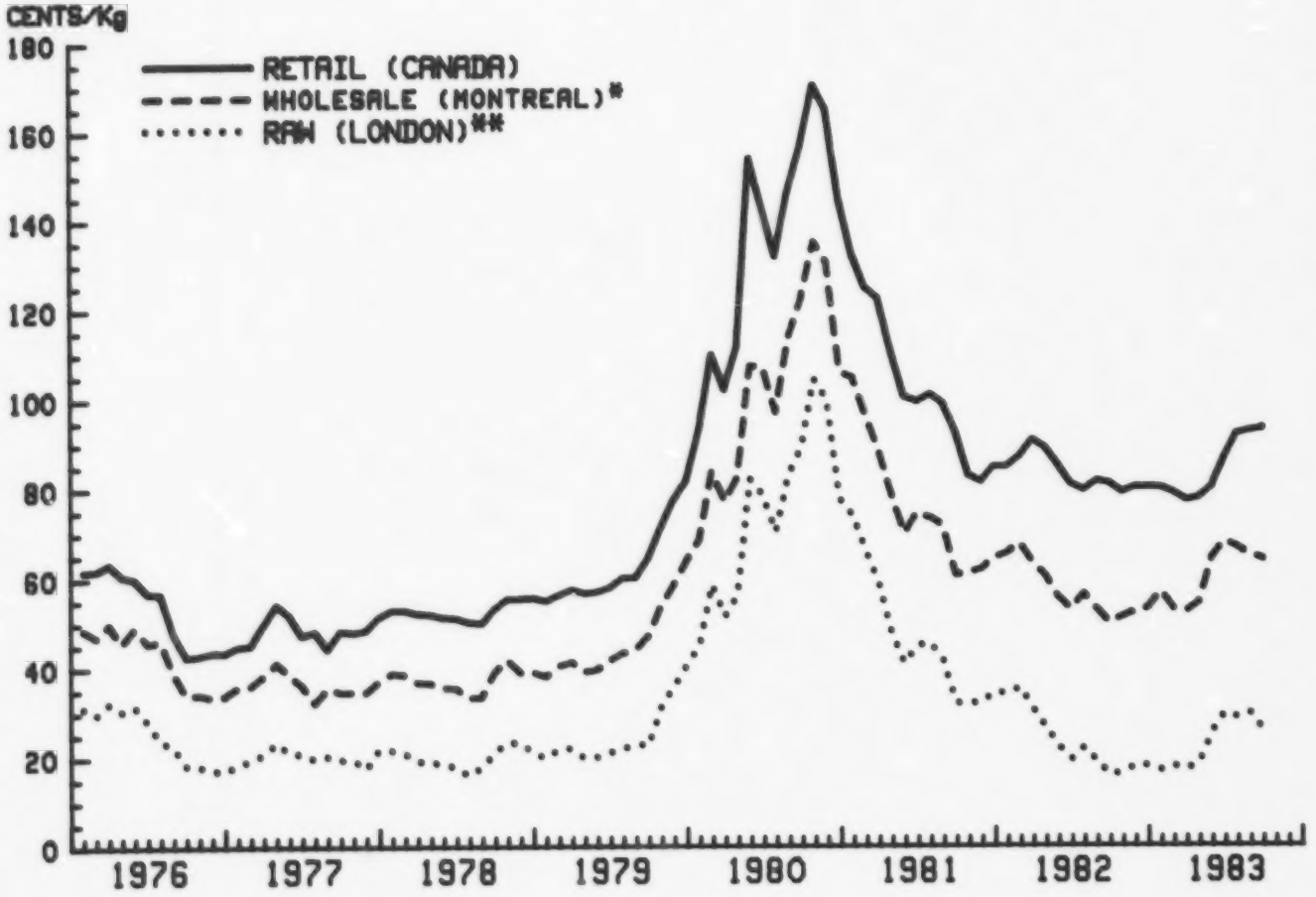
World honey production for 1983 is estimated at 921.7 thousand tonnes, up from 912 thousand tonnes in 1982. Most of this small increase occurred in North America. World production is expected to continue to increase at a marginal rate for the next few years.

PRODUCTION AND GROWER PRICES FOR SPECIAL CROPS

	Crop year		
	1981-82	1982-83	1983-84[1]
Dry beans[4]			
Production ('000 t)	104.4	89.7	52.0
Grower price ($/t)	640.00[2]	298.00[2]	475.00
Fababeans			
Production ('000 t)	11.5	12.0	12.0
Grower price ($/t)	187.00	198.00	220.00
Dry peas			
Production ('000 t)	110.2	135.0	109.9
Grower price ($/t)	192.13	198.00[2]	220.00
Lentils			
Production ('000 t)	55.7	76.6	52.8
Grower price ($/t)	430.11	396.00[2]	396.00[2]
Mustard			
Production ('000 t)	98.0	80.3	90.9
Grower price ($/t)	339.27	265.00[2]	375.00
Buckwheat			
Production ('000 t)	52.8	29.0	35.9
Grower price ($/t)	322.40	333.00[2]	275.00
Sugar beets			
Production ('000 t)	1215.1	1040.9	1170.2
Grower price ($/t)	38.86	40.00[2]	40.00
Tobacco (flue-cured)			
Production ('000 t)	110.5	67.5[3]	108.5
Grower price ($/t)	3373.00	3555.20	3637.63

[1] Minimum expected price
[2] Preliminary
[3] Ontario crop reduced by frost on August 29, 1982
[4] Includes estimates for colored beans in both eastern and western Canada

SUGAR PRICES, CANADA: RETAIL, WHOLESALE AND RAW (MONTHLY), 1976 TO 1983

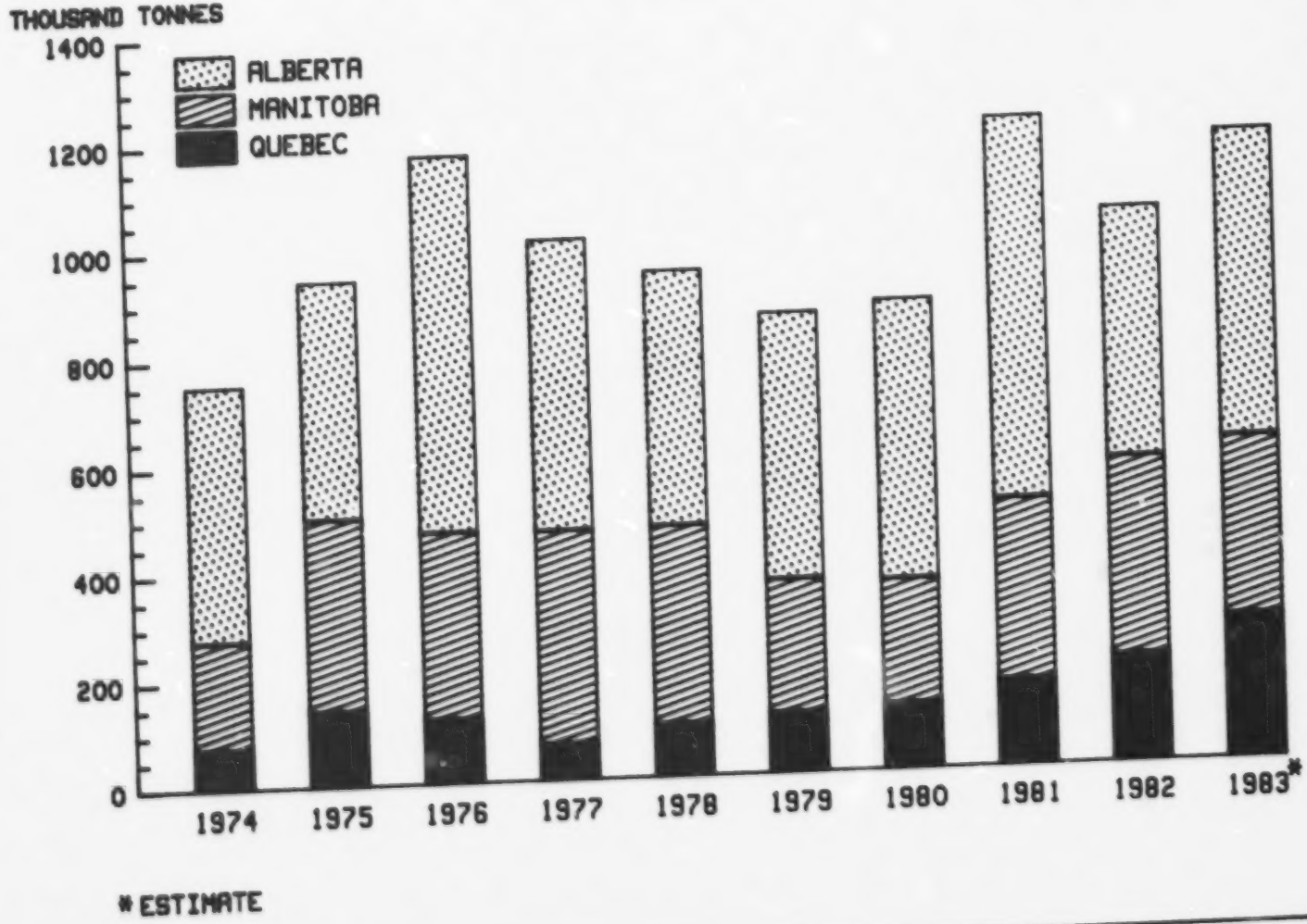


*SEPTEMBER 1980 ONWARD (TORONTO)
**F.O.B. CARIBBEAN

SOURCE: RETAIL: COMPUTED FROM STATISTICS CANADA 62-010
WHOLESALE: COMPUTED FROM REDPATH INDUSTRY QUOTATIONS
RAW: COMPUTED FROM INTERNATIONAL SUGAR ORGANIZATION

2 Kg packs.
40 Kg Sacks.
(MTRV'S).

SUGAR BEET PRODUCTION, CANADA, 1974 TO 1983



APPENDIX B

TABLE 1. DRIED BEANS : AREA, AVERAGE YIELD PER HECTARE, DISPOSITION AND PRICES IN CANADA, 1971-75 TO 1983-84 (CROP YEAR AUGUST 1 TO JULY 31)

TABLEAU 1. HARICOTS SECS : SUPERFICIE, RENDEMENT MOYEN A L'HECTARE, REPARTITION ET PRIX AU CANADA, 1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER AOUT AU 31 JUILLET)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- hectares -			
Area						Superficie
Quebec[3]	648	-	-	-	-	Quebec[3]
Ontario	58071	58460	54630	49570	35661	Ontario
Canada	58720	58460	54630	49570	35661	Canada
			- tonnes - - tonnes métriques -			
Yield per ha. (Canada)	1.495	1.349	1.911	1.810	1.458	Rendement à l'ha. (Canada)
			- tonnes - - tonnes métriques -			
Canada						Canada
Production	87806	78874	104400	89710	52000	Production
Imports[1]	7505	11148	11441	11088		Importations[1]
Total supply	95311	90022	115841	100798		Approvisionnements
Exports[2]	48753	63915	75086	54107		Exportations[2]
Available for domestic use	46558	26107	40755	42691		Disponibles pour utilisation domestique
			- dollars per tonne - - dollars la tonne métrique -			
Average farm price[4]	327.48	431.79	640.00	298.00	475.00	Prix moyen à la ferme[4]

1. Include seed beans.
   Comprennent les haricots de semence.

2. Average of calendar years, 1971-75.
   Moyenne des années civiles, 1971-75.

3. Quebec estimates discontinued in 1976.
   Estimations pour le Quebec discontinuées en 1976.

4. Excludes Agriculture Stabilization Board subsidies paid in 1977 and 1978.
   Ne comprend pas les subventions versées par l'office de stabilisation des prix agricoles en 1977 et 1978.

TABLE 2. DRY PEAS : AREA, AVERAGE YIELD PER HECTARE, DISPOSITION AND PRICES IN CANADA
1971-75 TO 1983-84 (CROP YEAR AUGUST 1 TO JULY 31)
TABLEAU 2. POIS SECS : SUPERFICIE, RENDEMENT MOYEN A L'HECTARE, REPARTITION ET PRIX
1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER 1 AOUT AU 31 JUILLET)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- hectares -			
Area						Superficie
Canada	29923	38283	59900	70010	62300	Canada
Quebec[3]	388	..	..	..	..	Quebec[3]
Ontario[2]	627	..	..	..	..	Ontario[2]
Manitoba	16649	25090	40470	44520	40450	Manitoba
Saskatchewan	3035	10117	16190	20230	16200	Saskatchewan
Alberta	8790	2995	3240	5260	5650	Alberta
British Columbia[4]	559	405	..	..	..	Columbie-Britannique[4]
			- tonnes -			
			- tonnes metriques -			
Yield per Ha (Canada)	1.567	1.732	1.840	1.928	1.765	Rendement a Ha (Canada)
			- tonnes -			
			- tonnes metriques -			
Canada						Canada
Production	46890	66324	110220	134990	109950	Production
Imports[1]	6424	6675	7212	7101		Importations[1]
Total supply	53314	72999	117432	142091		Approvisionnements
Exports[1]	20010	49366	93019	88849		Exportations[1]
Available for domestic use	33304	23633	24412	53241		Disponibles pour utilisation domestique
			- dollars per tonne -			
			- dollars la tonne metrique -			
Average farm price	149.90	175.62	192.13	198.00	220.00	Prix moyen a la ferme

1. Includes seed peas.
Comprennent les pois de semence.

2. Data not published after 1974-75.
Les données non publiées après 1974-75

3. Data not published after 1975-76.
Les données non publiées après 1975-76.

4. Data not published after 1977-78.
Les données non publiées après 1977-78.

TABLE 3. MUSTARD SEED : AREA, AVERAGE YIELD PER HECTARE, DISPOSITION AND PRICES IN CANADA, 1971-75 TO 1983-84 (CROP YEAR AUGUST 1 TO JULY 31)

TABLEAU 3. GRAINE DE MOUTARDE : SUPERFICIE, RENDEMENT MOYEN A L'HECTARE, REPARTITION ET PRIX AU CANADA, 1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER 1 AOUT AU 31 JUILLET)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- hectares -			Superficie
Area						
Canada	99901	72681	89030	66770	78900	Canada
Manitoba	10384	15298	18210	10120	14200	Manitoba
Saskatchewan	64183	41277	52610	36420	38400	Saskatchewan
Alberta	25333	16106	18210	20230	26300	Alberta
			- tonnes - - tonnes metriques -			
Yield per Ha (Canada)	.880	.987	1.101	1.203	.895	Rendement a Ha (Canada)
			- tonnes - - tonnes metriques -			
Canada						Canada
Production	87961	71741	97980	80300	70615	Production
Imports [1]	..	2369	1833	1572		Importations [1]
Total supply	87961	74110	99813	81872		Approvisionnements
Exports	69339	67517	69213	74199		Exportations
Available for domestic use	18621	6593	30600	7673		Disponibles pour utilisation domestique
			- dollars per tonne - - dollars la tonne metrique -			
Average farm price	204.22	234.01	339.25	265.00	375.00	Prix moyen a la ferme

1. Data, available only after 1975, apply to calendar years.
Les données correspondent aux années civiles et ne sont disponibles qu'à partir de 1976.

TABLE 4. BUCKWHEAT: AREA, AVERAGE YIELD PER HECTARE, DISPOSITION AND PRICES IN CANADA, 1971-75 TO 1983-84 (CROP YEAR AUGUST 1 TO JULY 31)

TABLEAU 4. SARRASIN : SUPERFICIE, RENDEMENT MOYEN A L'HECTARE, REPARTITION ET PRIX AU CANADA, 1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER 1 AOUT AU 31 JUILLET)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- hectares -			
Area						Superficie
Canada	35523	49024	56780	55440	46130	Canada
New Brunswick[4]	853.40	0.00	..	..	..	Nouveau-Brunswick[4]
Quebec	4112	6419	6190	8900	9700	Quebec
Ontario[3]	5090.30	4998.00	..	..	..	Ontario[3]
Manitoba	23067	38606	50590	46540	36400	Manitoba
Saskatchewan[1]	0.00	..	..	..	..	Saskatchewan[1]
Alberta[2]	0.00	..	..	..	..	Alberta[2]
			- tonnes - - tonnes metriques -			
Yield per Ha (Canada)	.984	.807	.930	.523	.726	Rendement a Ha (Canada)
			- tonnes - - tonnes metriques -			
Canada						Canada
Production	34958	39574	52820	28980	33500	Production
Exports	22742	29992	27996	17852		Exportations
			- dollars per tonne - - dollars la tonne metrique -			
Average farm price[5]	106.89	190.06	322.40	333.00	275.00	Prix moyen a la ferme[5]

1. Data are available only for the period 1969-70 to 1973-74.
   Les données sont disponibles seulement pour les années 1969-70 a 1973-74.

2. Data are available only for the period 1969-70 to 1971-72.
   Les données sont disponibles seulement pour les années 1969-70 a 1971-72

3. Estimates for Ontario discontinued in 1980.
   L'estimation pour l'Ontario est discontinuée en 1980.

4. Estimates for New Brunswick discontinued in 1976.
   L'estimation pour le Nouveau-Brunswick a été discontinuée en 1976.

5. Contract price, 1980-81 to 1981-82.
   Le prix sous contrat, 1980-81 a 1981-82.

TABLE 5. TOBACCO PRODUCTION AND PRICES, 1971-75 TO 1983 (YEAR OF HARVEST)
TABLEAU 5. TABAC PRODUCTION ET PRIX, 1971-75 A 1983 (ANNEE DE LA RECOLTE)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Estimated 1983 Provisions[1]	
	- tonnes, green weight - - tonnes metriques poids vert -					
Production						Production
Ontario						Ontario
Flue-cured	95155	86764	99739	56699	97500	Tabac jaune
Burley	1106	1052	1027	1715	2000	Burley
Dark	396	570	421	535	600	Tabac fonce
Quebec						Quebec
Flue-cured	4689	5440	6851	6460	6500	Tabac jaune
Cigar	1029	742	367	441	540	A cigares
Pipe	119	45	20	21	30	A pipe
Maritimes						Maritimes
Flue-cured	2713	3015	3944	4304	4500	Tabac jaune
Canada						Canada
Flue-cured	102557	95219	110534	67463	108500	Tabac jaune
Burley	1106	1052	1027	1715	2000	Burley
Cigar	1029	742	367	441	540	A cigares
Dark	396	570	421	535	600	Tabac fonce
Pipe	119	45	20	21	30	A pipe
Total	105207	97628	112369	70175	111670	Total
	- dollars per kilogram, green weight - - dollars le kilogramme, poids vert -					
Average farm price, Canada						Prix moyen a la ferme, Canada
Flue-cured	1.80	2.64	3.37	3.56	3.64	Tabac jaune
Burley	1.36	2.00	3.59	3.15	3.15	Burley
Cigar	1.06	1.65	1.91	2.15	2.15	A cigares
Dark	1.41	1.97	2.55	2.92	3.15	Tabac fonce
Pipe	1.22	1.96	2.40	2.00	2.10	A pipe

1. Prices shown are guaranteed minimum prices.
Les prix mentionnés sont des prix minima garantis.

TABLE 6. SUPPORT LEVEL AND AVERAGE RETURNS FOR SUGAR BEETS, 1966-67 TO 1981-82 (CROP YEAR SEPTEMBER 1 TO AUGUST 31)
TABLEAU 6. NIVEAU DE SOUTIEN ET PRIX MOYENS DES BETTERAVES A SUCRE, 1966-67 A 1981-82 (CAMPAGNE AGRICOLE DU 1ER SEPT. AU 31 AOUT.

Crop Year	Support Level Niveau de soutien	Returns from Processors[2] Prix payés par les conditionneurs[2]	Federal Payment Paiement fédéral	Total Returns Recettes totales	Campagne agricole
		- dollars per standard tonne[1] - - dollars la tonne régulière[1] -			
1966-67	15.82	12.24	5.32	17.56	1966-67
1967-68	17.09	12.10	5.96	18.06	1967-68
1968-69	17.61	15.44	3.56	19.00	1968-69
1969-70	17.61	16.76	2.52	19.28	1969-70
1970-71	17.61	17.84	.95	18.79	1970-71
1971-72	17.61	20.60	0.00	20.60	1971-72
1972-73	17.61	23.56	0.00	23.56	1972-73
1973-74	..	48.67	0.00	48.67	1973-74
1974-75	..	56.36	0.00	56.36	1974-75
1975-76	a.	37.79	0.00	37.79	1975-76
1976-77	31.69	30.67	1.08	31.75	1976-77
1977-78	32.74	31.68	1.07	32.75	1977-78
1978-79	a.	38.60	0.00	38.60	1978-79
1979-80	a.	77.79	0.00	77.79	1979-80
1980-81	a.	68.42	0.00	68.42	1980-81
1981-82	53.45	47.79	5.66	53.45	1981-82

a. Not designated for support under the 1975 Agricultureal Stabilization Act.
Non-désigné pour soutien sous la Loi sur la stabilisation des prix agricoles de 1975.

1. Equivalent to 125 kg. of refined sugar. Data before 1977-78 have been converted from the 250 lb. basis, using the factor 1.10231.
Equivalent à 125 kg. de sucre raffiné. Les données antérieures à 1977-78 ont été converties au système métrique, en employant le facteur 1,10231.

2. Weighted average price paid by processors to producers, in all provinces, except that Qubec is excluded before 1981.
Prix moyen pondéré payé par les transformateurs aux producteurs, dans toutes les provinces (Québec exclu avant 1981).

TABLE 7. SUGAR BEETS AREA, PRODUCTION AND AVERAGE PRICE
1971-75 TO 1983-84 (CROP YEAR SEPTEMBER 1 TO AUGUST 31)
TABLEAU 7. SUPERFICIE, PRODUCTION ET PRIX MOYEN DE BETTERAVES SUCRE,
1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER SEPTEMBRE AU 31 AOUT)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
	- hectares -					Superficie
Area						
Quebec	2742	2268	3885	5018	6777	Quebec
Manitoba	11534	10242	11229	11232	11331	Manitoba
Alberta	16028	14041	14164	12302	12950	Alberta
Canada	30304	26551	29278	28552	31058	Canada
	- tonnes - - tonnes métriques -					
Production						Production
Canada	933920	970450	1215083	1040926	1179912	Canada
	- dollars per tonne of beets - - dollars la tonne métrique de betteraves -					
Average farm price[b.]						Prix moyen à la ferme[b.]
Canada	34.27	45.58	38.86[c.]	40.00[a.]	40.00	Canada

a. Preliminary.
Provisoire.

b. Excludes Agricultural Stabilization Board payments.
Ne comprend pas les subventions versées par l'office de stabilisation des prix agricoles.

c. Average grower return including Quebec Income Assurance level minus premium for insurance.
Prix moyen à la production: comprend le revenu assuré au Québec moins les primes d'assurance.

TABLE 8. HONEY: SUPPLY, DISPOSITION AND PRICES, CANADA, 1971-75 TO 1983-84 (CROP YEAR JULY 1 TO JUNE 30)
TABLEAU 8. MIEL: APPROVISIONNEMENTS, REPARTITION ET PRIX, CANADA, 1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER JUILLET AU 30 JUIN)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- tonnes - - tonnes metriques -			
Stocks, July 1[1]	4308	4658				Stocks, 1er juillet[1]
Production	22629	29244	34770	30528	34779	Production
Imports	759	313	376	209		Importations
Total Supply	27697	34215	35146	30737		Approvisionnements
Exports	5407	8163	8537	9616		Exportations
Available for domestic use	22289	26052	26609	21121		Disponibles pour utilisation domestique
Stocks, June 30[1]	4482	4478				Stocks, 30 juin[1]
Apparent domestic disappearance[2]	17807	21574	26609	21121		Consommation domestique apparente[2]
Net Trade	4822	7670	8161	9407		Commerce net
Aveage farm price (dollars per kilogram)	.85	1.25	1.68	1.66		Prix moyen à la ferme (dollars le kilogram)

1. No longer available after 1978.
N'est plus disponible après 1978.

2. Stocks are not taken into account after July 1, 1978.
Ne tient pas compte des stocks après le 1er juillet 1978.

TABLE 9. HONEY: PRODUCTION, CANADA AND PROVINCES, 1971-75 TO 1983-84 (CROP YEAR JULY 1 TO JUNE 30)

TABLEAU 9. MIEL: PRODUCTION, CANADA ET PAR PROVINCE, 1971-75 A 1983-84 (CAMPAGNE AGRICOLE DU 1ER JUILLET AU 30 JUIN)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981-82	1982-83	Preliminary 1983-84 Provisoire	
			- tonnes - - tonnes metriques -			
Prince Edward Island	22	48	66	58	61	Ile du Prince-Edouard
Nova Scotia	144	182	288	222	254	Nouvelle-Ecosse
New Brunswick	77	107	178	132	181	Nouveau-Brunswick
Quebec	1558	2649	4792	3376	3810	Québec
Ontario	3373	3408	3343	2642	3175	Ontario
Manitoba	3809	6314	7569	7789	6736	Manitoba
Saskatchewan	3337	4868	5948	5812	7144	Saskatchewan
Alberta	8722	9730	10478	8210	11313	Alberta
British Columbia	1588	1938	2107	2286	2105	British Columbia
Canada	22629	29244	34769	30527	34779	Canada

TABLE 10. MAPLE SYRUP, SUGAR AND TAFFY: PRODUCTION IN CANADA BY PROVINCES, 1971-75 TO 1983 (CALENDAR YEAR)
TABLEAU 10. SIROP D'ERABLE, SUCRE ET TIRE: PRODUCTION AU CANADA ET PAR PROVINCE, 1971-75 A 1983 (ANNEE DU CALENDRIER)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
	- kilolitres of syrup equivalent - - kilolitres d'equivalent de sirop -					
Nova Scotia	25	39	58	54	65	Nouvelle-Ecosse
New Brunswick	47	44	50	36	50	Nouveau-Brunswick
Quebec	7620	8606	13458	7786	8270	Québec
Ontario	656	646	655	791	718	Ontario
Canada	8348	9335	14221	8667	9103	Canada

Conversions: 1.0 kg. of sugar = 1.0 litre of syrup = 1.34 kg. of syrup.
1.04 kg. of taffy = 1.0 litre of syrup.
Conversions: 1.0 kg. de sucre = 1.0 litre de sirop = 1.34 kg. de sirop.
1.04 kg. de tire = 1.0 litre de sirop.

TABLE 11. MAPLE SYRUP, SUGAR AND TAFFY: SUPPLY, DISPOSITION AND PRICES, 1971-75 TO 1983 (CALENDAR YEAR)

TABLEAU 11. SIROP D'ERABLE, SUCRE ET TIRE: APPROVISIONNEMENTS, REPARTITION ET PRIX, 1971-75 A 1983 (ANNEE DU CALENDRIER)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
	- kilolitres of syrup equivalent - - kilolitres d'equivalent de sirop -					
Production	8348	9335	14221	8667	9103	Production
Imports[1]	..	112	133	102		Importations[1]
Total Supply	8348	9447	14354	8769		Approvisionnements
Exports	3810	4199	4856	4850		Exportations
Available for domestic use	4538	5248	9498	3918		Disponibles pour utilisation domestique
Average farm price						Prix moyen à la ferme
Maple syrup (dollars per litre)	1.55	2.59	2.90	3.09		Sirop d'érable (dollars le litre)
Maple sugar (dollars per kilogram)	2.26	4.04	5.54	5.97	6.89	Sucre d'érable (dollars le kilogram)

1. Not available before 1976. Syrup only, 1976 to 1979.
Non disponible avant 1976. Seulement le sirop, de 1976 à 1979.

Conversions: 1.0 kg. of sugar = 1.0 litre of syrup = or 1.34 kg. of syrup.
1.04 kg. of taffy = 1.0 litre of syrup.

Conversions: 1.0 kg. de sucre = 1.0 litre de sirop = ou 1.34 kg. de sirop.
1.04 kg. de tire = 1.0 litre de sirop.

ORNAMENTAL HORTICULTURE

C. Duguay

FLORICULTURE

SITUATION

For the year 1982, 1750 greenhouse growers participated in a Statistics Canada Survey of which 1414 produced flowers and ornamentals. For those producers who responded to the survey, sales of flowers and ornamentals totaled $214.7 million, a decrease of 1% from 1981.

Sales of flowers and ornamentals made directly to consumers by producers during 1982 totaled $60.29 million, 5% less than in 1981. The increasing popularity of retail chain store sales may explain this cutback in direct sales. Having completed the adjustments necessary in order to increase their flower and ornamental sales by providing a complete service for their clientele, the chain stores have seen, during recent years, a significant increase in sales. In 1982 these sales reached $21.08 million. Canadian wholesalers bought $59.1 million worth of flowers and ornamentals in 1982. This was 5% less than 1981 sales but considerably better than in 1980. Retail flower sales continued to increase and accounted for about $58.43 million. Sales through the three public auction sales in Canada increased 9% to $21.57 million.

The value of the Canadian dollar on the world market has improved the competitive position of producers on the international market, increasing the export value by 21% in 1982.

Importations of cut flowers increased in 1982. The volume of imported carnations experienced an increase of 30%. Shipments from the United States increased 20%, while those from Columbia were up 34%. Imports of roses climbed 35% in 1982. The number of roses imported from the United States was 29% higher than in 1981. Columbia, the second most important rose shipper to Canada, increased its sales by 14% in 1982. Imports of cut flowers other than roses and carnations increased a marginal 1%. According to Flowers Canada, imports of cut chrysanthemums increased significantly during the past year. Unfortunately there are no published statistics on the matter.

Total production of flowers and ornamentals, according to Statistics Canada, experienced a decline of approximately 7% in 1982. Specifically, rose production declined 17%, standard and miniature carnations were down 5.9 and 6.9% respectively, while regular chrysanthemum production was down 29%. Miniature chrysanthemum production showed a minor increase of 1.3%, while potted chrysanthemum production was down 10.9%. With respect to tropical foliage and green plant production, survey results indicated a decline of 21.7%. Statistics Canada relies on industry replies to questionnaires for the above data. In a number of situations, industry sources suggest that the replies to these questionnaires have not been complete. In particular, industry

representatives suggest that rose production actually increased in 1982. An explanation of the difference is that one major grower in the survey used by Statistics Canada stopped production and thus biased the report. With respect to carnations, the industry acknowledges a decline. For other items, the industry believes that regular and miniature chrysanthemum production was similar to that of last year while production of all other items was actually up.

The cost of energy for those operators producing flowers only was $21.89 million in 1982. Statistics Canada conducted a special review in 1981 in order to measure the impact of the high cost of energy on greenhouse production of flowers and vegetables. The results, available this past summer, demonstrated that the majority of producers have adopted most measures available to reduce energy use in their production. Better temperature control inside the greenhouse, insulation of the north side of lateral walls, use of a double polyethylene curtain on the glass of the greenhouse and insulation of the foundation were the most utilized measures. Among the respondents, 576 producers (37.8% of the respondents) indicated they had made no change. Consequently, there may be a chance for an additional reduction in the cost of energy for greenhouse production.

Policy and development

An industry-government meeting this past summer identified a number of concerns confronting the industry. These included plant breeder's rights, pesticide registration, rate of depreciation acceptable for tax purposes, research, promotion and the collection of commercial data. A number of recommendations for action by both government and industry were considered.

The floriculture sector is presently facing a number of difficulties which will eventually affect the future of the industry. Imported cut flowers are the major concern of the industry. Replaced by low-priced imports, regular carnation production has declined steadily in recent years. Production of regular chrysanthemums seems to be encountering a similar situation. Consequently, Canadian flower producers are interested in protecting their market so that the same fate that befell carnations will not afflict chrysanthemums.

Pesticide registration is also a serious problem for Canadian producers. Currently it is very difficult for a chemical company to register products in Canada. The required tests take a long time and costs are considerable. If the volume of prospective sales is limited, chemical firms cannot afford to register the materials. After a period of time, pests and diseases become resistant to various chemicals and if new ones are not available yields will decline. This leaves Canadian producers at a disadvantage with respect to producers in other countries.

"In vitro" test-tube production of roses in the laboratory is expected to begin on a commercial scale in November 1983 in the United States. This method of producing roses, which is much faster than current

methods, was developed in France and is currently in commercial use in that country. Roses will attain maturity earlier and have a greater resistance to disease.

OUTLOOK

In 1983, sales of cut flowers and ornamentals will increase about 18% to a value of approximately $253 million. Prices will increase approximately 7% with the volume sold increasing significantly. Looking forward to 1984 and 1985, if promotion efforts are maintained, sales may reach $280 and $301 million respectively. The volume of sales will increase 4% in 1984 over 1983 while sales in 1985 will be about 5% above those of 1984. Prices will increase about 3% in 1984 and 4% in 1985 as the economy continues to improve.

Tropical, foliage and green plant sales will be maintained, while the demand for potted and cut flowers will increase during the next years. Sales of conventional flowers, such as roses and carnations should remain constant or increase slightly. Demand for gerbera potted and cut, violets and reiger begonia plants should increase in the coming years. Consumers will continue to look for a long-lasting product that will create a pleasant atmosphere both in the home and at work.

For the next few years, producers will continue to compete with imported, low priced products, especially cut flowers. Production of regular carnations will stagnate or decline slowly while the production of regular chrysanthemums will compete with imports, likely maintaining a stable level of production for the next few years. Exports of potted plants will increase slightly over the next few years.

NURSERY CROPS

SITUATION

Nursery sales, including products and service contracts were $176.8 million in 1982 compared with $211.6 million in 1981. This decrease of 16.5% in total revenue causes even more concern in light of the increase in the number of respondents. This sector of the industry bought $27.4 million worth of materials (nursery products and sod), some 21% less than that of last year. The value of plants bought for landscaping and those plants bought for sale during the year declined 17 and 24% respectively. In terms of the total area of land utilized for the production of nursery plants and sod, an increase of 22% in 1982 was reported by Statistics Canada. This may not reflect actual growth, since the number of producers responding to the survey increased very significantly. Supplies will be up in the next few years and thus the industry will be in a position to meet the anticipated improvement in demand.

In 1982, 537 producers reported having received revenue from the sale of nursery plants. Data for the average revenue per enterprise indicated a decline of 22% per unit from the previous year. Sales of fruit trees were down 5% from last year. Establishment of new orchards

in the last few years plus the rehabilitation of existing orchards had accounted for considerable growth. More recently, producers have become aware of the problems of over-planting, which explains some of the sales decline in 1982. Landscape contractors have bought 3% fewer plants than last year. As a result of adverse weather during the spring of 1982, sales of nursery plants to garden centers and to retail stores decreased 19 and 22% respectively. For the 204 producers reporting the purchase of stocks for resale, the average sales per enterprise was down 11%.

The average revenue for contract service firms declined 32% in 1982. The health of this sector is dependent on the interest rate as well as on the construction industry, and thus has been adversely affected by recent conditions in these two areas. Sales of sod have declined 11%, also as a result of limited activity in the construction sector. Sales of related products in this sector declined 31% in 1982.

In 1982, Canada increased exports by 7%. Despite the consequences of the recession in the United States, Canada exported 97% of its exports to that market. Imports of different nursery products were slightly higher than in 1981 but considerably higher than in 1980. The United States remains the principal commercial trading partner for both imports and exports.

OUTLOOK

The rate of construction of new houses decreased in 1982. This was because mortgage rates were well above average for the first three quarters and the level of disposable income was depressed. It was not until the fourth quarter of 1982 and during the first two quarters of 1983 that the housing sector experienced a recovery. Consumers benefited from a reduction in interest rates as well as various federal and provincial government programs.

The industry reported an increase in sales for 1983 but at a slower rate than anticipated. The contracted services sector has been encountering heavy competition and thus prices will have increased only marginally.

By quantifying the relationships between a number of market factors, it is estimated that sales of nursery stock in 1983 will increase approximately 11%. Fruit tree sales should remain at about the same level as last year, while ornamental sales should increase. This improvement will be the result of an increase in the volume of sales, and prices should maintain current levels. However, prices are expected to rise slowly during the next few years. In 1984 total sales of nursery products will increase approximately 5%, partly in response to activity in the construction industry during the last quarter of 1982 and the first two quarters of 1983. For 1985, total sales and prices may improve as much as 6% as disposable income rises and new house construction picks up momentum.

APPENDIX C

TABLE 1. GREENHOUSE FLORICULTURAL CROPS[1]: FARM VALUE, CANADA AND PROVINCES, 1971-75 TO 1983 (CALENDAR YEAR)

TABLEAU 1. CULTURES FLORALES DE SERRE[1]: VALEUR A LA FERME, CANADA ET PROVINCES, 1971-75 A 1983 (ANNEE DU CALENDRIER)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	Preliminary 1983 Provisoire	
	- thousand dollars - - milliers de dollars -					
Prince Edward Island[2]	1356	2588	4098	4036		Ile du Prince-Edouard[2]
Nova Scotia	4733	7316	8614	9529		Nouvelle-Ecosse
New Brunswick	1124	3162	4035	4382		Nouveau-Brunswick
Quebec	8322	17294	25523	24041		Québec
Ontario	49135	91276	120003	120724		Ontario
Manitoba	946	1931	3637	3469		Manitoba
Saskatchewan	441	1092	1683	1140		Saskatchewan
Alberta	3613	9317	16162	18229		Alberta
British Columbia	7076	22380	33149	29151		British Columbia
Canada	76746	156355	216904	214702		Canada

1. Include cut flowers, floral plants, roots and cuttings and vegetable bedding plants. Sales of the latter are not available separately since 1969, but amounted to 1.8 percent of the 1965-69 total value for Canada.
Comprend les fleurs coupées, les plants, les racines et les boutures florales ainsi que les plants de légumes pour transplantation. Les ventes de ces derniers ne sont pas disponibles séparément depuis 1969, mais représentent seulement 1.8 pourcent du total 1965-69 pour le Canada.

2. Also includes Newfoundland.
Comprend aussi Terre-Neuve.

TABLE 2. FLORICULTURAL AND RELATED PRODUCTS: VALUE OF EXPORTS AND IMPORTS, CANADA, 1971-75 TO 1983 (CALENDAR YEAR)

TABLEAU 2. PRODUITS DE FLORICULTURE ET PRODUITS ASSIMILES: VALEUR DES EXPORTATIONS ET DES IMPORTATIONS, CANADA, 1971-75 A 1983 (ANNEE DU CALENDRIER)

	Average 1971-75 Moyenne	Average 1976-80 Moyenne	1981	1982	1983[1]	
	- thousand dollars - - milliers de dollars -					
Exports[2]						**Exportations[2]**
Floral Plants, Roots and bulbs	2289	5334	12278	17196	14056	Plantes florales, racines et bulbes
Floral and other Cuttings and Stocks[3]	566	656	1689	1143	744	Boutures, produits floraux et autres[3]
Cut flowers etc.[4]	2703	4096	4157	4436	3370	Fleurs coupées, etc.[4]
Cut Flowers[5]	a.	1217	1957	2379		Fleurs coupées[5]
Total Exports[6]	5559	10086	18124	22775	18170	Total des exportations[6]
Imports[7]						**Importations[7]**
Gladioli Bulbs	139	159	205	242	261	Bulbes de glaïeuls
Tulip bulbs	937	1097	1557	1615	368	Bulbes de tulipes
Other floral bulbs and roots	2067	3560	5158	6224	2751	Autre racines et bulbes floraux
Rose bushes	1426	2350	4013	3665	4104	Rosiers
Floral and other cuttings, and stocks[8]	10815	30585	43877	44434	35722	Boutures, produits floraux et autres[8]
Cut flowers etc.[9]	8622	18022	27042	29966	24961	Fleurs coupées, etc.[9]
Cut flowers[10]	a.	15072	22024	25658		Fleurs coupées[10]
Total Imports[11]	24006	55773	81852	86156	68167	Total des importations[11]
Net Trade	-18448	-45687	-63728	-63381	-49997	**Commerce Net**

a. Not available or omitted.
Non disponible ou omis.

1. Jan. - Aug. only.
janv. à août seulement.

2. Exclude individual shipments valued at less than 100 dollars.
A l'exclusion des expéditions individuelles évaluées à moins de 100 dollars.

3. Mainly floral cuttings. Also includes trees and small fruit plants.
Surtout les boutures. Comprend aussi les plantes arborescentes et arbustives.

4. Also includes cut decorative holly and 'nursery and greenhouse stock, n.e.s.'
Comprend aussi le gui coupé décoratif et les plants de pépinières et de serres, n.d.a.

5. U.S. imports of cut flowers and cut foliage from Canada, which are included in exports of 'Cut Flowers, etc.'above, and which are shown here only for the years 1976 to date (thus limiting the average). Since 1968, or earlier, Canadian exports of 'Cut Flowers, etc.', to all countries have virtually consisted of those to U.S.A.
Exportations de fleurs coupées et de plantes vertes coupées aux Etats-Unis. Depuis 1968, ou même avant, ces exportations formaient la quasi-totalité des envois vers tous les pays. Ces chiffres, donnés ici pour les années après 1975, seulement, sont inclus dans 'Fleurs coupées,etc.'(ci-dessus).
Les moyennes ne s'appliquent qu'aux années après 1975.

6. Sum of the 3 exports items shown above (excluding duplication).
Total des trois produits d'exportation mentionnés ci-haut (excluant la duplication).

7. Exclude individual shipments valued at less than 200 dollars.
A l'exclusion des expéditions individuelles évaluées à moins de 200 dollars.

8. Mainly floral cuttings. Also includes trees and other nursery stocks, except fruit trees, stocks and cuttings.
Surtout les boutures. Comprend aussi les arbres et autres stocks de pépinière, à l'exception des arbres fruitiers, des plants et des boutures.

9. Also includes 'decorative plant materials, n.e.s.' but excludes wreaths, corsages and other prepared floral articles.
Comprend aussi les produits de plantes décoratives n.d.a. mais exclus les couronnes, les corsages et autres articles floraux.

10. Included in 'Cut Flowers, etc.',above. Data not available before 1976 (averages limited accordingly).
Compris dans 'Fleurs coupées, etc.',(ci-dessus). Données non disponibles avant 1976.
Les moyennes ne s'appliquent qu'aux années après 1975.

11. Sum of the 6 import items shown above (excluding duplication).
Total des six produits d'importation mentionnés ci-haut(excluant la duplication).

CONVERSION FACTORS

Metric units	Approximate conversion factors	Results in:
LINEAR		
millimetre (mm)	x 0.04	inch
centimetre (cm)	x 0.39	inch
metre (m)	x 3.28	feet
kilometre (km)	x 0.62	mile
AREA		
square centimetre (cm^2)	x 0.15	square inch
square metre (m^2)	x 1.2	square yard
square kilometre (km^2)	x 0.39	square mile
hectare (ha)	x 2.5	acres
VOLUME		
cubic centimetre (cm^3)	x 0.06	cubic inch
cubic metre (m^3)	x 35.31	cubic feet
	x 1.31	cubic yard
CAPACITY		
litre (L)	x 0.035	cubic feet
hectolitre (hL)	x 22	gallons
	x 2.5	bushels
WEIGHT		
gram (g)	x 0.04	oz avdp
kilogram (kg)	x 2.2	lb avdp
tonne (t)	x 1.1	short ton
AGRICULTURAL		
litres per hectare (L/ha)	x 0.089	gallons per acre
	x 0.357	quarts per acre
	x 0.71	pints per acre
millilitres per hectare (mL/ha)	x 0.014	fl. oz per acre
tonnes per hectare (t/ha)	x 0.45	tons per acre
kilograms per hectare (kg/ha)	x 0.89	lb per acre
grams per hectare (g/ha)	x 0.014	oz avdp per acre
plants per hectare (plants/ha)	x 0.405	plants per acre

POOR

QUALITY

ORIGINAL